

# PRISM

## **\* PRISM 5.0, Service Pack 12**

### ***New Functionality***





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# Overview

This document describes the changes made in PRISM 5.0 in Service Pack 12. Enhancements to PRISM user functionality are listed first, and in alphabetical order. Administrator functionality is last.

[illegible]



## **Contracting Officer Representative – Automatic Access to Awards**

PRISM has been enhanced to now automatically give the Contracting Officer Representative access to the awards to which they are assigned. This applies to all awards except IAA's and MIPR's.



## *Your Notes*

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Dollar Amount Notification

The notification envelope icon has been added to the *Contract Ceiling* field on the Limits page for contracts, the *Maximum Amount* field on the Items General page, and the *Total Amount of Calls Not to Exceed* field on the Limits page for BPA setups. Use it to access the Notification Detail page, on which you can add notifications for contract ceilings, maximum amounts on contracts, and call limits on BPA setups.

## Limits Page for Contracts

This section illustrates how this notification envelope icon for the *Contract Ceiling* field might look on the Limits page for contracts, at your agency.

To access this page, follow these steps.

1. From the PRISM Welcome page, open or create a contract. The General Information page displays.
2. Click **Limits** on the left menu. The Limits page displays.

The screenshot shows the PRISM web application interface. On the left is a navigation menu with the PRISM logo at the top. Below the logo, the 'Contract' section is expanded, showing a list of options: Main, General, Additional Info, UCA, Text, Payments, Limits (highlighted with a red box), Summary, Items, Vendor, Recurring Obligations, Package, Supporting Docs, and Summary Report. The main content area has a top bar with buttons: Route, Release, Delete, Cancel, FPDS, Renumber, and a help icon. Below this is the 'Contract Information' section, displaying 'Contract Number: CON-PJB-002', 'Stage: Award', 'Number of Items: 0', 'Version: BASE-In Progress' (with a dropdown arrow), 'Net View: Off', 'Total Amount: \$0.00', and 'Obligation: \$0.00'. The 'Limits' section is below, with a sub-header 'Per Delivery Order/Task Order Limits' and two input fields for 'Minimum Order Amount' and 'Maximum Order Amount'. The 'Contract Limits' section follows, with a 'Minimum Amount' input field, a 'Contract Ceiling' input field (circled in red with a red envelope icon to its right), a 'Guaranteed Minimum' checkbox, and a 'Print Limits' checkbox.

## Items General Page

This section illustrates how this notification envelope icon for the *Maximum Amount* field might look on the Items General page for contracts, at your agency.

To access this page, follow these steps.

1. From the PRISM Welcome page, open or create a contract. The General Information page displays.

2. Click **Items** on the left menu. The Items page displays.
3. Click **Add**, or select an item from the list and click **Edit**. The Item General page displays.

The screenshot displays the PRISM application interface. On the left is a navigation menu with the PRISM logo and a 'Contract' section containing links like 'General', 'Additional Info', 'UCA', 'Orders', 'Ship To / Acct', 'Payment', 'Discount', 'Warranty', 'Text', 'Suspense Items', 'Summary', 'Validations', and 'Return'. The 'General' link is selected. The main content area is titled 'Item General' and contains the following fields and controls:

- Navigation buttons: First, Previous, Next, Last, Add, Copy, Delete, ?
- Item Information section:
  - Contract Number: FIL-CON-01-001
  - Item Number: 0001 of 1
  - Item Number: [text box] Sub Item Number: [text box] Go To [button]
- Item General section:
  - Item Number: [text box with value 1]
  - Sub Item Number: [text box]
  - Sequence for Sub Number: [text box]
  - User Product Code: [text box] [icon]
  - Description: [text area]
  - Requisition Number: (None) [icon]
  - Solicitation Number: (None) [icon]
  - Product Service Code: [text box] [icon]
  - Period of Performance: [text box] to [text box] [icon]
  - Calculate By Percentage: ☒
  - Print Detail: ☐
  - Line Item Type: [text box] [icon]
  - Contractor Proposal Amount: [text box]
  - Qualifier: By Quantity [dropdown]
  - Award Type: Indefinite-quantity [dropdown]
  - Unit of Issue: [text box] [icon]
  - Unit Price: [text box]
  - Min. Quantity: [text box]
  - Max. Quantity: [text box]
  - Min. Amount: 0.00 [text box]
  - Max. Amount: 0.00 [text box] [icon] (highlighted with a red circle)
  - Minimum Guaranteed: ☐

## Limits Page for BPA Setups

This section illustrates how this notification envelope icon for the *Total Amount of Calls Not to Exceed* field might look on the Items General page at your agency.

**PRISM**

**BPA Setup**

Main

General

Additional Info

Text

**Limits**

Volume Discount

Summary

Vendor

Currency

Summary

Route Self Approve Release Delete Cancel FPDS Renumber ?

**BPA Setup Information**

BPA Setup Number: EVAN-SETUP-000 Stage: Award

Version: BASE-In Progress Net View: Off

**Limits**

**Limits for BPA Calls**

Minimum Amount per Call:

Maximum Amount per Call:

Total Amount of Calls Not to Exceed:

## Notification Detail Page (for Limits)

There is a new Notification Detail page in PRISM. Use this page to set up the notifications for limits on your contracts.

To access this page, follow these steps.



### Note

The steps below describe one way to access this page, but there might be multiple ways.

1. From the PRISM Welcome page, open or create a contract. The General Information page displays.
2. Click **Limits** on the left menu. The Limits page displays.
3. Click the notification envelope for the *Contract Ceiling* field. The Notification Detail page displays.

**PRISM**

*Click Submit to save your data.*

**Notification Detail**

Type of Notification: Reminder of Action

Party to Notify: User

User ID:

Name:

**Notification Trigger**

Total Amount of Task / Delivery Orders Exceeds: % of Contract Ceiling

**Message**

Reminder of Action

Document Owner:

Generate

Submit Cancel

## Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
<b>Type of Notification</b>	Displays the notification type that corresponds to the field you were using when you clicked the notification envelope.
<b>Party to Notify</b>	<p>Select <b>User</b> if you want a PRISM user to receive the notification. If you select <b>User</b>, you must also type or select an ID in the <i>User ID</i> field.</p> <p>Select <b>External</b> if you want someone outside of PRISM to receive the notification. If you select <b>External</b>, you must also type the name of the person in the <i>Name</i> field, and type their email address in the <i>Email</i> field.</p>
<b>User ID</b>	Displays if you select <b>User</b> in the <i>Party to Notify</i> field. Type or select the user ID of the PRISM user to whom you want to send the notification.

Field Name	Description
<b>Name</b>	Displays if you select <b>User</b> in the <i>Party to Notify</i> field. Pre-fills with the name of the PRISM user to whom you want to send the notification, according to your entry in the <i>User ID</i> field.
<b>Note:</b> There are two <i>Name</i> fields that might display, according to your selection in the <i>Party to Notify</i> field.	
<b>Name</b>	Displays if you select <b>External</b> in the <i>Party to Notify</i> field. Type the name of the person outside of PRISM to whom you want to send the notification.
<b>Email</b>	Displays if you select <b>External</b> in the <i>Party to Notify</i> field. Type the email address of the person outside of PRISM to whom you want to send the notification.
<b>Notification Trigger</b>	
<b>Total Amount of Task / Delivery Orders Exceeds</b>	Select <b>% of Contract Ceiling</b> , or <b>in Total</b> , and type the total amount on the blank field to the left of the drop-down list.
<b>Message</b>	
<b>Document Owner</b>	Displays the name of the PRISM user who owns this document. If you create a document, PRISM automatically considers you to be the document owner. Therefore, you have the right to view and edit the document. Other PRISM users can be granted shared ownership via the Preferences module.

### Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
<b>Generate</b>	Click to automatically generate the notification text, according to your selections in the fields on this page.
<b>Submit</b>	Click to save your work and return to the previous page.
<b>Cancel</b>	Click to return to the previous page without saving your work.

[illegible]



## NG Pullback

PRISM has been enhanced so that you can access a read-only page that you can refresh with the most current FPDS-NG data for a version of an award. For example, if you access the FPDS-NG system and change your document reporting there, you can now go back into PRISM after you make your changes in FPDS-NG and click **Refresh** on the Review FPDS Record page to bring those changes into PRISM.

This enhancement applies to the following award types:

- Purchase orders.
- Contracts.
- Delivery orders/task orders.
- BPA setups.
- BPA calls.

## Using the FPDS-NG Pullback Feature

This section describes the FPDS-NG Pullback enhancement and how it is used in PRISM.

### ***Review FPDS Record Menu Option***

The Review FPDS Record menu option is new in PRISM. It is available for released documents after final approval in PRISM.

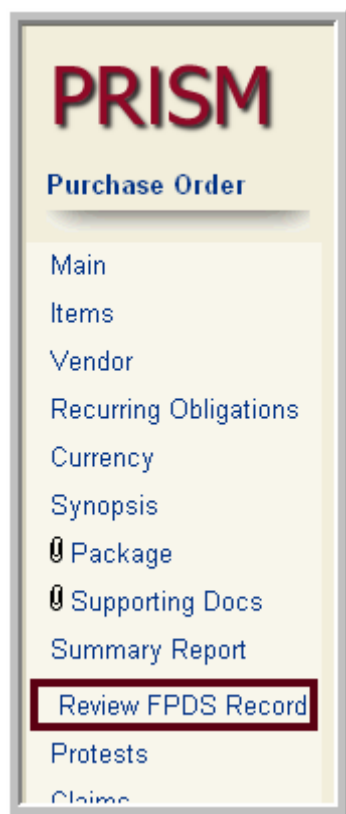


### ***Review FPDS Record Page***

The Review FPDS Record page is new in PRISM. It enables you to view the most current FPDS-NG data for a version of an award.

To access this page, follow these steps.

1. From the PRISM Welcome page, open a released award that has already been through final approval in PRISM. The General Information page displays.
2. Click **Review FPDS Record** on the left menu. The Review FPDS Record page displays.

**Note**

The **Review FPDS Record** menu option displays only when the award is released and a record exists in FPDS-NG in a final state.

The screen shot on the next page illustrates how this page might look at your agency.

PRISM		Index	
<b>Performance Data</b> PID Number: RUPILLACUS Status: Released Number of Items: 0 Version: 8.000 Stage: Released/Amend Total Amount: \$0.00 Not View: OFF Obligation: \$0.00			
<b>General Information</b> Award Title: R. Pullback Title Prepared By: COMPSURANCE Prepared Date: 8/20/2007 Last Modified By: COMPSURANCE Last Modified Date: 8/20/2007			
<b>Award ID</b> Agency ID: 788 PID: RUPILLACUS Modification Number: 8 Transaction Number: 8			
<b>Related EV Agency ID (None)</b> Reason for Modification (None) Substitution ID (None)			
<b>Dates</b> Date Signed: 8/20/2007 Effective Date: 8/20/2007 Completion Date: 8/24/2007 Estimated Ultimate Completion Date: 8/24/2007			
<b>Amounts</b> Action Obligation: \$0.00 Base and Executed Option Value: \$0.00 Base and All Option Value: \$0.00 Fee Paid for Use of EV: \$0.00			
<b>Purchaser Information</b> Contracting Office Agency ID: 788 Contracting Office ID: 8004 Funding Agency ID: 752 Funding Office ID (None) Funded by Foreign Entity: Yes Reason for User Agency Contracting (None)			
<b>Contractor Information</b> CCR Execution (None) Name: COMPSURANCE SOFTWARE/2077580/9100PUB/170 Doing Business As (None) Street Address 1: 2281 BOLDEN PARK DRIVE Street Address 2 (None) Street Address 3 (None) City: STEUBENS State: VA Zip Code: 25806 Congressional District (None) Country: USA Phone (None) Fax No (None) DUNS No (None)			
<b>Zero Economic Data</b> Veterans Owned: No 8(a) Firms: No HUB Zone: No SDB: No JWOC (Disadvantaged Women-Owned): No HBCU: No Educational Institution: No Women Owned: No Asian Pacific American Owned Business: No Service Disabled Veteran: No Local Government: No Minority Institution: No American Indian Owned Business: No State Government: No Federal Government: No Minority Owned Business: No Tribal Government: No Black American Owned Business: No Native American Owned Business: No Subcontracted Asian (Asian Indian) American Owned Business: No Non-Profit Organization: No Hispanic American Owned Business: No Emerging Small: No Hospital: No Organization Type (None) Number of Employees: 0 Annual Revenue: 000000			
<b>Contract Data</b> Type of Contract: S - Cost/FFW Multi Year Contract: Yes Major Program: 447-75 Cost or Pricing Data (None) Purchase Card Used or Payment Method: Yes Letter Contract: No Performance Based Service Acquisition: Yes Contingency Management Procurement Operation (None) Contract Financing (None) Cost Accounting Standards: No Number of Actions: 0 Consolidated Contract: Yes			
<b>Legislative Mandates</b> Single Line Act: Yes Service Contract Act: No Walsh-Healey Act: No Davis Bacon Act: No			
<b>Principal Place of Performance</b> Principal Place of Performance City (State/Location/Country): N/A/US/USA Congressional District Place of Performance: 12 Place of Performance Zip Code: 25806			
<b>Product or Service Information</b> Product / Service Code: 858 Principal NAICS Code: 8580 Detailed Requirements (None) System Equipment Code: 0 Country of Product Origin: A0 Place of Manufacture: N/A Use of Recycled Material: A - FAR 25.201-4 Excluded Information Technology Commercial Item Category: D - Non-Commercial Item Clearance Program Code: A0 Test Transportation: N - Unknown GFE / GPP Provided Under This Action: Yes Use of EPA Compliant Products (None) Description of Requirement: 0000			
<b>Competition Information</b> Entire Contract: B - Not Available for Competition Solicitation Procedures: A0 - Alternative Sources Type of Solicitation: 0000 - No work used Evaluation Preference: 0000 - No preference used Research (None) Statutory Exception to Fair Opportunity (None) Reason Not Completed: 000 - Derived from FWS/Inag/00 Agency Number of Offers Received: 0 Small Business Competitiveness Demonstration Program: No Commercial Item Test Program: No Commercial Item Acquisition Procedures: No FAR 25.201-4 Excluded: Yes SBA / FPM System View: Yes Alternative Advertising: Yes A0 Action: No			
<b>Performance Programs - Other Data</b> Contracting Officer's Business Size Selection: C - Other Than Small Business Subcontract Plan (None) Price Evaluation Percent Offsetting (None) Reason Not Awarded to Small Disadvantaged Business (None) Reason Not Awarded to Small Business (None)			
<b>Agency Specific Data</b> Offer's Proposal Number (None) ORI Number (None) Acquisition Number (None) Installation Unique (None) Administrator Code (None) Contracting Office Code (None) Registration Code (None) Organization Code (None) COTS Name (None) Placement Placement Code (None) Contract Fund Code (None) Management Reporting Requirements (None) Accounting Information Number (None) Field of Science or Engineering (None) Contract Administration Designated (None) Contract ID: No Advisory Assistance Services Contract: No Support Services Test Contract: No New Technology or Patent Rights Choice: No Property Financial Reporting: No Value Engineering Choice: No Security Code: No Is Priority Contract: No Physical Completion Date (None) First Invoice Paid Date (None) Funded Through Date (None) Subcontract Invoiced Date (None) Completion Date (None) Delivery Date (None) Principal Investigator (None) Alternate Principal Investigator (None) Other Statutory Authority (None)			

**Field Definitions**

This table lists the fields on this page and definitions of each.

<b>Field Name</b>	<b>Definition</b>
<b><i>General Information</i></b>	
<b>Award Type</b>	Displays the award type for the document. For example, if this is a purchase order, it displays B - Purchase Order.
<b>Prepared By</b>	Displays the name of the person who prepared the document.
<b>Prepared Date</b>	Displays the date on which the document was prepared.
<b>Last Modified By</b>	Displays the name of the person who last modified the document.
<b>Last Modified Date</b>	Displays the date on which the document was last modified.
<b>Award ID</b>	Displays the award identification code.
<b>Agency ID</b>	Displays your agency's PRISM system identification code.
<b>PIID</b>	Displays the Procurement Instrument Identifier (PIID) identification code.
<b>Modification Number</b>	Displays the document's modification number.
<b>Transaction Number</b>	Displays the document's transaction number.
<b>Referenced IDV Agency ID</b>	Displays the agency's referenced indefinite delivery vehicle (IDV) identification code. If one was not entered, displays ( None ).
<b>Reason for Modification</b>	Displays the reason for the modification if this document is a modification to an award. If one was not entered, displays ( None ).
<b>Solicitation ID</b>	Displays the solicitation identification code. If one was not entered, displays ( None ).
<b><i>Dates</i></b>	
<b>Date Signed</b>	Displays the date on which the document was signed.
<b>Effective Date</b>	Displays the date on which the document was effective.
<b>Completion Date</b>	Displays the date on which the tasks on the award were completed.

Field Name	Definition
<b>Estimated Ultimate Completion Date</b>	Displays the date on which the tasks on the award are estimated to be complete.
<i>Amounts</i>	
<b>Action Obligation</b>	Displays the obligation amount for this action.
<b>Base and Exercised Options Value</b>	Displays the value of base and exercised options.
<b>Base and All Option Value</b>	Displays the value of base and all options.
<b>Fee Paid for Use of IDV</b>	Displays the fee paid for use of the indefinite delivery vehicle (IDV).
<i>Purchaser Information</i>	
<b>Contracting Office Agency ID</b>	Displays the contracting office's agency identification code.
<b>Contracting Office ID</b>	Displays the contracting office's identification code.
<b>Funding Agency ID</b>	Displays the funding agency's identification code.
<b>Funding Office ID</b>	Displays the funding office's identification code. If one was not entered, displays (None).
<b>Funded by Foreign Entity</b>	Displays Yes if this award is funded by a foreign entity. Otherwise, displays No.
<b>Reason for Inter-Agency Contracting</b>	Displays the reason for inter-agency contracting. If one was not entered, displays (None).
<i>Contractor Information</i>	
<b>CCR Exception</b>	Displays the CCR exception code. If one was not entered, displays (None).
<b>Name</b>	Displays the contractor's full business name.
<b>Doing Business As</b>	Displays the contractor's doing-business-as name (usually a truncated version of the full business name that displays in the <i>Name</i> field). If one was not entered, displays (None).

Field Name	Definition
<b>Street Address 1</b>	Displays the contractor's business address.
<b>Street Address 2</b>	Displays the contractor's business address. If one was not entered, displays ( None ).
<b>Street Address 3</b>	Displays the contractor's business address. If one was not entered, displays ( None ).
<b>City</b>	Displays the city in which the contractor's business is located.
<b>State</b>	Displays the state in which the contractor's business is located.
<b>Zip Code</b>	Displays the contractor's ZIP code.
<b>Congressional District</b>	Displays the congressional district in which the contractor's business is located. If one was not entered, displays ( None ).
<b>Country</b>	Displays the country in which the contractor's business is located.
<b>Phone</b>	Displays the contractor's telephone number. If one was not entered, displays ( None ).
<b>Fax No</b>	Displays the contractor's FAX number. If one was not entered, displays ( None ).
<b>DUNS No</b>	Displays the contractor's DUNS number.
<b><i>Socio Economic Data</i></b>	
<b>Veteran Owned</b>	Displays Yes if the vendor's business is veteran-owned. Otherwise, displays No.
<b>8(a) Firm</b>	Displays Yes if the vendor's business is an 8(a) firm. Otherwise, displays No.
<b>HUB Zone</b>	Displays Yes if the vendor's business is a HUB Zone. Otherwise, displays No.
<b>SDB</b>	Displays Yes if the vendor's business is a small disadvantaged business. Otherwise, displays No.
<b>JWOD (Sheltered Workshop)</b>	Displays Yes if the vendor's business is a sheltered workshop. Otherwise, displays No.
<b>HBCU</b>	Displays Yes if the vendor's business is HBCU. Otherwise, displays No.

Field Name	Definition
<b>Educational Institution</b>	Displays Yes if the vendor's business is a school. Otherwise, displays No.
<b>Woman Owned</b>	Displays Yes if the vendor's business is woman-owned. Otherwise, displays No.
<b>Asian Pacific American Owned Business</b>	Displays Yes if the vendor's business is Asian Pacific American-owned. Otherwise, displays No.
<b>Service Disabled Veteran</b>	Displays Yes if the vendor's business is service disabled veteran-owned. Otherwise, displays No.
<b>Local Government</b>	Displays Yes if the vendor's business is local government-owned. Otherwise, displays No.
<b>Minority Institution</b>	Displays Yes if the vendor's business is a minority institution. Otherwise, displays No.
<b>American Indian Owned Business</b>	Displays Yes if the vendor's business is American Indian-owned. Otherwise, displays No.
<b>State Government</b>	Displays Yes if the vendor's business is veteran-owned. Otherwise, displays No.
<b>Federal Government</b>	Displays Yes if the vendor's business is a state government. Otherwise, displays No.
<b>Minority Owned Business</b>	Displays Yes if the vendor's business is minority-owned. Otherwise, displays No.
<b>Tribal Government</b>	Displays Yes if the vendor's business is a tribal government. Otherwise, displays No.
<b>Black American Owned Business</b>	Displays Yes if the vendor's business is Black American-owned. Otherwise, displays No.
<b>Native American Owned Business</b>	Displays Yes if the vendor's business is Native American-owned. Otherwise, displays No.
<b>Subcontinent Asian (Asian Indian) American Owned Business</b>	Displays Yes if the vendor's business is Subcontinent Asian American-owned. Otherwise, displays No.
<b>Non-Profit Organization</b>	Displays Yes if the vendor's business is a non-profit organization. Otherwise, displays No.



Field Name	Definition
<b>Hispanic American Owned Business</b>	Displays Yes if the vendor's business is Hispanic American-owned. Otherwise, displays No.
<b>Emerging Small</b>	Displays Yes if the vendor's business is an emerging small business. Otherwise, displays No.
<b>Hospital</b>	Displays Yes if the vendor's business is a hospital. Otherwise, displays No.
<b>Organization Type</b>	Displays the vendor's type of organization if one was selected. If one was not entered, displays (None).
<b>Number of Employees</b>	Displays the number of employees working for the vendor.
<b>Annual Revenue</b>	Displays the vendor's annual revenue.
<b><i>Contract Data</i></b>	
<b>Type of Contract</b>	Displays the type of contract. For example, if this is a cost-no-fee contract, displays S - Cost No Fee.
<b>Multi Year Contract</b>	Displays Yes if this is a multi-year contract. Otherwise, displays No.
<b>Major Program</b>	Displays the agency's code for a major program within the agency.
<b>Cost or Pricing Data</b>	Displays the cost or pricing data for the award. If one was not entered, displays (None).
<b>Purchase Card Used as Payment Method</b>	Displays Yes if a purchase card was used to pay for the goods or services. Otherwise, displays No.
<b>Letter Contract</b>	Displays Yes if this is a letter contract. Otherwise, displays No.
<b>Performance Based Service Acquisition</b>	Displays Yes if this is a performance-based service acquisition. Otherwise, displays No.
<b>Contingency Humanitarian Peacekeeping Operation</b>	Displays the type of humanitarian or peacekeeping operation. If one was not entered, displays (None).
<b>Contract Financing</b>	Displays the type of contract financing. If one was not entered, displays (None).

Field Name	Definition
<b>Cost Accounting Standards Clause</b>	Displays Yes if cost accounting standards clause applies to this document. Otherwise, displays No.
<b>Number of Actions</b>	Displays the number of actions on the award.
<b>Consolidated Contract</b>	Displays Yes if this is a consolidated contract. Otherwise, displays No.
<b><i>Legislative Mandates</i></b>	
<b>Clinger Cohen Act</b>	Displays Yes if the Clinger-Cohen Act applies to this document. Otherwise, displays No.
<b>Service Contract Act</b>	Displays Yes if the Service Contract Act applies to this document. Otherwise, displays No.
<b>Walsh-Healey Act</b>	Displays Yes if the Walsh-Healey Act applies to this document. Otherwise, displays No.
<b>Davis Bacon Act</b>	Displays Yes if the Davis-Bacon Act applies to this document. Otherwise, displays No.
<b><i>Principal Place of Performance</i></b>	
<b>Principal Place of Performance Code (State, Location, Country)</b>	Displays the location in which the services on the award are to be performed.
<b>Congressional District Place of Performance</b>	Displays the congressional district in which the services on the award are to be performed.
<b>Place of Performance Zip Code(+4)</b>	Displays the specific address at which the services on the award are to be performed.
<b><i>Product or Service Information</i></b>	
<b>Product / Service Code</b>	Displays the product or service code for the items on the award.
<b>Principal NAICS Code</b>	Displays the principal North American Industry Classification System (NAICS) code for the items on the award.
<b>Bundled Requirements</b>	Displays the agency's reason for bundling contract requirements. If one was not entered, displays ( None ).

Field Name	Definition
<b>System Equipment Code</b>	Displays the system equipment code for the items on the award.
<b>Country of Product Origin</b>	Displays the country code for the country from which the items on the award were sent.
<b>Place of Manufacture</b>	Displays the country code for the country in which the items on the award were manufactured.
<b>Use of Recovered Material</b>	Displays the FAR clause that applies to the use of recovered material if recovered materials were included on the award.
<b>Information Technology Commercial Item Category</b>	Displays the IT category if the items are purchased for IT purposes.
<b>Claimant Program Code</b>	Displays the code from the DoD Procurement Coding Manual Section III, DoD Claimant Program Number.
<b>Sea Transportation</b>	Displays a code to indicate whether the contractor anticipates that some of the supplies being provided might be transported by sea.
<b>GFE / GFP Provided Under This Action</b>	Displays Yes if this award is for government furnished equipment or government furnished property. Otherwise, displays No.
<b>Use of EPA Designated Products</b>	Displays a code if the items being purchased are EPA-designated products. If one was not entered, displays ( None ).
<b>Description of Requirement</b>	Displays a description of the items or services being purchased.

Field Name	Definition
<b><i>Competition Information</i></b>	
<b>Extent Competed</b>	<p>Displays A Full and Open Competition if the action resulted from an award pursuant to FAR 6.102(a) - sealed bid, FAR 6.102(b) - competitive proposal, FAR 6.102(c) - Combination, or any other competitive method that did not exclude sources of any type.</p> <p>Displays B Not Available for Competition if the contract was not available for competition.</p> <p>Displays C Not Competed if the contract was not competed.</p> <p>Displays D Full and Open Competition after exclusion of sources if some sources were excluded before competition.</p> <p>Displays E Follow On to Competed Action if the action was a follow on to an existing competed contract. FAR 6.302-1.</p> <p>Displays F Competed under SAT if the action was competed under the Simplified Acquisition Threshold.</p> <p>Displays G Not Competed under SAT if the action is NOT competed under the Simplified Acquisition Threshold.</p> <p>Displays CDO Competitive Delivery Order Apply to Full and Open Competition pursuant to FAR 6.1 and only apply to Delivery Orders if the IDV type was a Federal Schedule and the delivery order/task order award permitted each contract awardee a fair opportunity to be considered, or if it was for the award of a multiple award schedule or an order against a multiple award schedule pursuant to FAR 6.102(d)(3).</p> <p>Displays NDO Non-Competitive Delivery Order if the award was noncompetitive.</p>

Field Name	Definition
<b>Solicitation Procedures</b>	<p>Displays NP Negotiated Proposal if the contract awarded over \$100K and used negotiated procedures.</p> <p>Displays SB Sealed Bid if contract awarded over \$100K and used sealed bidding procedures.</p> <p>Displays TS Two Step if the contract awarded over \$100K and used a combination of sealed bids and negotiated procedures.</p> <p>Displays SP1 Simplified Acquisition if the contract was awarded via competitive acquisition and used the simplified acquisition procedures in FAR 13.</p> <p>Displays AE Architect – Engineer if the action resulted from selection of sources for architect-engineer contracts as defined in FAR 6.102(d)(1).</p> <p>Displays BR Basic Research if the action resulted from competitive selection of basic research proposals as defined in FAR 6.102(d)(2).</p> <p>Displays AS Alternative Sources if the action resulted from the use of procedures that provide for full and open competition after exclusion of sources to reduce overall costs as defined in FAR 6.202(a)(1), to have a facility available for national defense or industrial mobilization as defined in FAR 6.202(a)(2), to establish or maintain an essential engineering, research, or development capability as defined in FAR 6.202(a)(3), to ensure the continuous availability of a reliable source of supply for such property or service as defined in FAR 6.202(a)(4), to satisfy projected needs for such product or service based on a history of high demand as defined in FAR 6.202(a)(5), to satisfy a critical need for medical, safety, or emergency supplies as defined in FAR 6.202(a)(6).</p> <p>Displays SP2 Simplified Acquisition Procedures – Non-Competitive if the action was non-competitive and only for a delivery order when the simplified acquisition procedures in FAR 13 were used.</p>
<b>Type of Set Aside</b>	Displays the type of set-aside for reporting.
<b>Evaluated Preference</b>	Displays the type of evaluated preference for reporting.
<b>Research</b>	<p>Displays the type of research used for reporting.</p> <p>If one was not entered, displays ( None ).</p>

Field Name	Definition
<b>Statutory Exception to Fair Opportunity</b>	Displays the type of statutory exception to Fair Opportunity used for reporting. If one was not entered, displays ( None ).
<b>Reason Not Competed</b>	Displays the code to explain why the solicitation was not competed.
<b>Number of Offers Received</b>	Displays the numbers of offers received.
<b>Small Business Competitiveness Demonstration Program</b>	Displays Yes if the small business competitiveness demonstration program applies to this award. Otherwise, displays No.
<b>Commercial Item Test Program</b>	Displays Yes if the commercial test program applies to this award. Otherwise, displays No.
<b>Commercial Item Acquisition Procedures</b>	Displays Yes if commercial item acquisition procedures were followed for this award. Otherwise, displays No.
<b>Pre Award FBO Synopsis</b>	Displays Yes if there was a pre-award FBO synopsis. Otherwise, displays No.
<b>SBA / OFPP Synopsis Waiver Pilot</b>	Displays Yes if the contract was awarded under the SBA/OFPP synopsis waiver pilot program. Otherwise, displays No.
<b>Alternative Advertising</b>	Displays Yes if alternative advertising was used for the award. Otherwise, displays No.
<b>A76 Action</b>	Displays Yes if A76 action was used for the award. Otherwise, displays No.
<b><i>Preference Programs / Other Data</i></b>	
<b>Contracting Officer's Business Size Selection</b>	Displays the contracting officer's business size selection.
<b>Subcontract Plan</b>	Displays the subcontract plan. If one was not entered, displays ( None ).
<b>Price Evaluation Percent Difference</b>	Displays the price evaluation percent difference. If one was not entered, displays ( None ).

Field Name	Definition
<b>Reason Not Awarded to Small Disadvantaged Business</b>	Displays the reason why the contract was not awarded to a small disadvantaged business. If one was not entered, displays (None).
<b>Reason Not Awarded to Small Business</b>	Displays the reason why the contract was not awarded to a small business. If one was not entered, displays (None).
<b><i>Agency Specific Data</i></b>	
<b>Offeror's Proposal Number</b>	Displays the offeror's proposal number. If one was not entered, displays (None).
<b>PR Number</b>	Displays the agency's purchase request number. If one was not entered, displays (None).
<b>Accession Number</b>	Displays the agency's accession number. If one was not entered, displays (None).
<b>Installation Unique</b>	Displays the agency's installation unique code. If one was not entered, displays (None).
<b>Administrator Code</b>	Displays the agency's administrator code. If one was not entered, displays (None).
<b>Contracting Officer Code</b>	Displays the agency's contracting officer code. If one was not entered, displays (None).
<b>Negotiator Code</b>	Displays the agency's negotiator code. If one was not entered, displays (None).
<b>Organization Code</b>	Displays the agency's organization code. If one was not entered, displays (None).
<b>COTR Name</b>	Displays the contracting officer's technical representative's code. If one was not entered, displays (None).
<b>Procurement Placement Code</b>	Displays the agency's procurement placement code. If one was not entered, displays (None).
<b>Contract Fund Code</b>	Displays the agency's contract fund code. If one was not entered, displays (None).

Field Name	Definition
<b>Management Reporting Requirements</b>	Displays the agency's managing reporting requirements code. If one was not entered, displays (None).
<b>Accounting Installation Number</b>	Displays the agency's accounting installation number. If one was not entered, displays (None).
<b>Field of Science or Engineering</b>	Displays the agency's field of science or engineering. If one was not entered, displays (None).
<b>Contract Administrations Delegated</b>	Displays the agency's delegated contract administrations. If one was not entered, displays (None).
<b>Closeout PR</b>	Displays Yes if this is the agency's closeout purchase request. Otherwise, displays No.
<b>Advisory Assistance Services Contract</b>	Displays Yes if this is the agency's advisory assistance services contract. Otherwise, displays No.
<b>Support Services Type Contract</b>	Displays Yes if this is the agency's support services type contract. Otherwise, displays No.
<b>New Technology or Patent Rights Clause</b>	Displays Yes if this is the new technology or patent rights clause applies to this contract. Otherwise, displays No.
<b>Property Financial Reporting</b>	Displays Yes if this is the agency's property financial reporting. Otherwise, displays No.
<b>Value Engineering Clause</b>	Displays Yes if this is the value engineering clause applies to this contract. Otherwise, displays No.
<b>Security Code</b>	Displays Yes if a security code was required for the contract. Otherwise, displays No.
<b>Is Physically Complete</b>	Displays Yes if this contract is physically complete. Otherwise, displays No.
<b>Physical Completion Date</b>	Displays the date on which the contract was physically complete. If one was not entered, displays (None).
<b>Final Invoice Paid Date</b>	Displays the date on which the final invoice was paid. If one was not entered, displays (None).

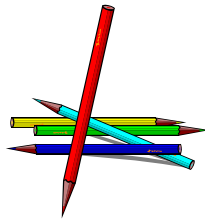


Field Name	Definition
<b>Funded Through Date</b>	Displays the date through which the contract was funded. If one was not entered, displays ( None ).
<b>Solicitation Issue Date</b>	Displays the date on which the solicitation was issued. If one was not entered, displays ( None ).
<b>Cancellation Date</b>	Displays the date on which the contract will be cancelled. If one was not entered, displays ( None ).
<b>Destroy Date</b>	Displays the date on which the contract will be destroyed. If one was not entered, displays ( None ).
<b>Principal Investigator</b>	Displays the agency's principal investigator. If one was not entered, displays ( None ).
<b>Alternate Principal Investigator</b>	Displays the agency's alternate principal investigator. If one was not entered, displays ( None ).
<b>Other Statutory Authority</b>	Displays the agency's other statutory authority. If one was not entered, displays ( None ).

### Button Definitions

This table lists the new button on this page and its definition.

Button Name	Description
<b>Refresh</b>	To access the updated information from FPDS-NG, click <b>Refresh</b> . PRISM retrieves the data and stores it back in a PRISM database.



## *Your Notes*

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

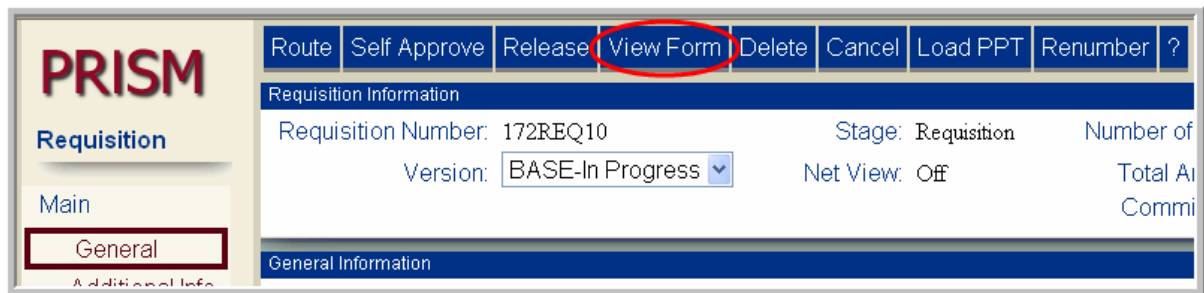
## Printer Icon

The **View Form** button was replaced with a printer icon on most pages in PRISM. Use the printer icon to generate PDF copies of your forms. It looks like this:



### Before

This is how the print form functionality might have looked at your agency before this enhancement.

A screenshot of the PRISM Requisition screen. The top navigation bar contains buttons: Route, Self Approve, Release, View Form (circled in red), Delete, Cancel, Load PPT, Renumber, and ?. The left sidebar shows 'PRISM Requisition' with 'Main' and 'General' (highlighted with a red box) under 'Additional Info'. The main content area displays 'Requisition Information' with fields for 'Requisition Number: 172REQ10', 'Stage: Requisition', 'Version: BASE-In Progress' (dropdown), 'Net View: Off', and 'Number of' (partially visible). Below this is a 'General Information' section.

### After

This is how the print form functionality might look at your agency after this enhancement.

A screenshot of the PRISM Requisition screen after the enhancement. The top navigation bar contains buttons: Route, Release, Delete, Cancel, Load PPT, Renumber, a printer icon (circled in red), and ?. The left sidebar is identical to the 'Before' screen, with 'General' highlighted. The main content area displays 'Requisition Information' with fields for 'Requisition Number: 325REQ016', 'Stage: Requisition', 'Version: BASE-In Progress' (dropdown), and 'Net View: Off'. Below this is a 'General Information' section.



## *Your Notes*

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Routing Changes

The PRISM routing process has been enhanced. Before this enhancement, PRISM did not stop the routing process for a reviewer route role unless the reviewer was in the first sequence on the route list.

After this enhancement, the reviewer role has been split into two functions and updated as follows:

- *Reviewer*: This role stops the route until they click **Mark Reviewed**.
- *Courtesy Copy*: This role does not stop the route, it is set up for “FYI” copies.

Additionally, the Private Routing List page at the administrator’s level has been updated to be more consistent with the Private Routing List page at the document-level.



### Notes

- Reviewers must review the document before the document is sent to the next person on the route.
- The reviewer role is similar in system performance to the approver role except that PRISM does not check the reviewer’s threshold limit.
- The courtesy copy reviewers do not need to review the document before the document is sent to the next person on the route.



### Important!

When your agency installs this new functionality in PRISM, an installation script updates your agency’s existing routing lists as follows:

- The reviewer set up in first sequence in a route will still be set up as a reviewer and that role will function as per this new enhancement (stop the route until the document is marked reviewed).
- Reviewers in sequence 2 and higher will be changed from the old reviewer role to the new courtesy copy role.

## System Setup

This section includes the setup necessary to use this new functionality.



### Reminder

Just a quick reminder... To set up route roles:

1. Click **System Setup** on the left menu.
2. Click **Agency** on the left menu. The Agency Codes Summary page displays.
3. Select **Route Role** in the *Agency Code Type* field.
4. Click **Add** to add a new route role, or select one from the list and click **Edit**.

## **Agency Options Page**

The *Send for Courtesy Copies* and *Send to Originator on Final Approval* fields are new in the E-mail Preferences for Routing section on the Agency Options page. Use them to set up PRISM to send these new notifications when you route your documents.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Click **Agency** on the left menu. The General Summary page displays.
4. Click **Options** on the left menu. The Options Summary page displays.
5. Click **Edit** on the blue toolbar. The Agency Options page displays. (See screen shot, next page.)

**PRISM**

Click Submit to save your data.

**Agency Options**

**Address**

Use Postal Format for Address: ☐

**Item**

Maximum Line Item Number Length:   
Maximum Sub Line Item Number Length:   
Print Line Item Numbers with Leading Zeros: ☐  
Limit Delivery Locations per Line Item to 1: ☐

**Requisition**

Requisition Number Exact Length:   
Require Unit Price on Requisition Line Items: ☐  
Requisitioner is Required: ☐

**Delivery/Task Order**

Enforce Contract Min/Max Limits on Delivery/Task Orders:   
Allow DOs on Fixed-price Contracts: ☐

**BPA**

Enforce BPA Min/Max Limits on BPA Calls:

**Grants**

Type of Grants Data Reporting:

**Section 845 OT**

Type of Section 845 OT Data Reporting:

**Invoice**

Require Invoice Matching: ☐

**Acceptance**

Acceptance Type:

**USSGL**

USSGL Trans Code:   
Check USSGL Trans Code: ☐  
USSGL Trans Code SL:   
Default for Requisition:   
Default for Award:

**Account Code Separator**

Account Code Separator:

**Project**

Project Number:   
Check Project Number: ☐  
Project Number SL:

**Task**

Task Number:   
Check Task Number: ☐  
Task Number SL:

**Product Code**

Require Product Code: ☐

**Allow Route Cancellation**

Route Originator: ☐  
Administrators: ☐  
Anyone on Route: ☐

**E-mail Options:**

Send E-mail Through:   
System Email Address:

**E-mail Preferences for Routing:**

Send to Approvers: ☐  
Send to Reviewers: ☐  
Send for Courtesy Copies: ☐  
Send to Originator on Final Approval: ☐  
Send to Originator on Disapproval: ☐

**Support Documents and Attachments**

Compress Files: ☐

Submit

Cancel

## Field Definitions

This table lists the new fields on this page, and definitions of each.



### Note

These fields are disabled and values cleared if you set the *Send Email Through* field on this page to **None**.

Field Name	Description
<b>Send for Courtesy Copies</b>	Check the box if you want PRISM to send an email in addition to the PRISM Inbox message to the courtesy copy reviewer when the document is routed.
<b>Send to Originator on Final Approval</b>	Check the box if you want PRISM to send an email notification to the originator when the routed document is final-approved.

## Create Routing List Page

To support the enhancements to the PRISM routing process, this page was relabeled to Create Routing List (was labeled Routing List For) and the *Routing Order* field was removed and replaced by the **Move** button on the Private Routing List page. The functionality from the *Routing Order* field which enabled you to move a user to a specific location in a route list was incorporated into the Move Sequence page (see [Move Sequence Page](#)).

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route List Maintenance page displays.
3. Click **Add** on the blue toolbar. The Create Routing List page displays.

This is how this page might now look at your agency.



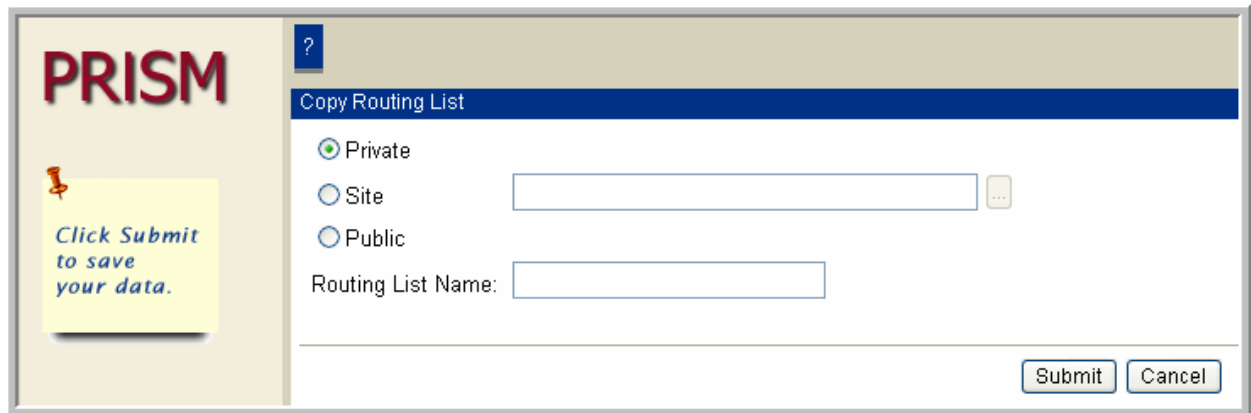
## Copy Routing List Page

To support the enhancements to the PRISM routing process, the *Routing Order* field was removed from this page.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route List Maintenance page displays.
3. Select a routing list and click **Copy** on the blue toolbar. The Copy Routing List page displays.

This is how this page might now look at your agency.



The screenshot shows the PRISM application interface. On the left is a sidebar with the PRISM logo and a yellow sticky note that says "Click Submit to save your data." The main content area has a title bar "Copy Routing List". Below the title bar are three radio buttons: "Private" (which is selected), "Site", and "Public". To the right of the "Site" and "Public" radio buttons is a text input field. Below these is a label "Routing List Name:" followed by another text input field. At the bottom right of the form are two buttons: "Submit" and "Cancel".

## Move Sequence Page

This page was added to PRISM to support the enhancements to the routing process. Use it to move a user to a location higher or lower than another sequence number in a routing list.

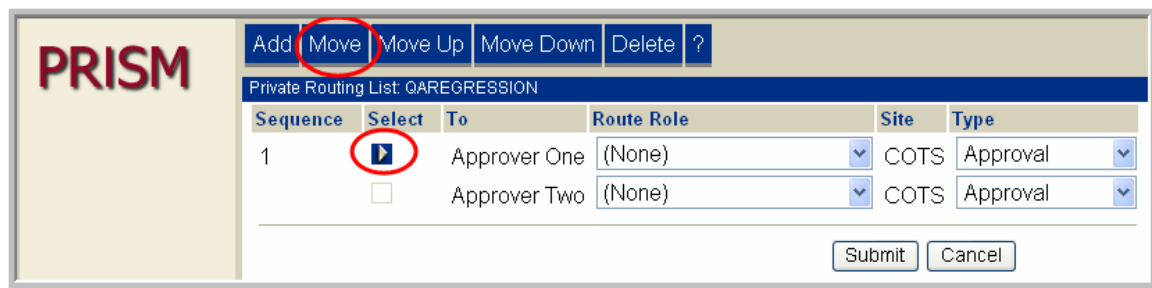


### Note

This page was also added in the Preferences module (Preferences | Routing Lists | select routing list and Edit | select user and Move), and at the document level (open or create document | Route | select user and Move).

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Routing Lists** on the left menu. The Route Lists Maintenance page displays.
3. Click **Add**, or select a route from the list and click **Edit**. The Private Routing List page displays.
4. Select the user you want to move into another position in the list and click **Move** on the blue toolbar. The Move Sequence page displays.



The screenshot shows the PRISM interface for a Private Routing List. The toolbar at the top includes buttons for 'Add', 'Move', 'Move Up', 'Move Down', 'Delete', and a help icon. The 'Move' button is circled in red. Below the toolbar, the title is 'Private Routing List: QAREGRESSION'. A table lists routing steps:

Sequence	Select	To	Route Role	Site	Type
1	<input checked="" type="checkbox"/>	Approver One	(None)	COTS	Approval
	<input type="checkbox"/>	Approver Two	(None)	COTS	Approval

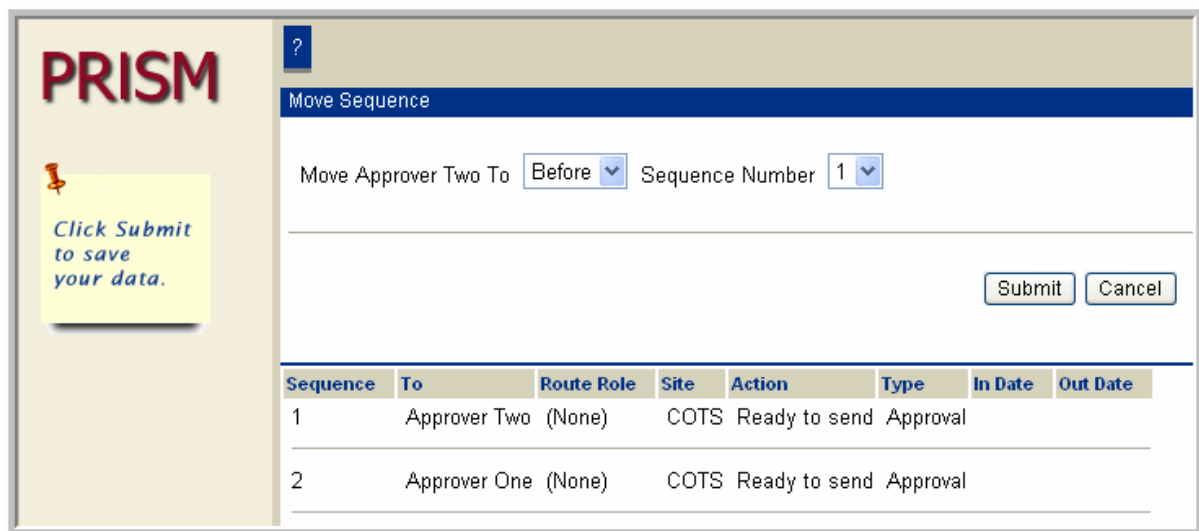
At the bottom right are 'Submit' and 'Cancel' buttons.



**Note**

The **Move** button does not display on the blue toolbar unless there are two or more users in the routing list.

This is how the Move Sequence page might look at your agency.



The screenshot shows the PRISM 'Move Sequence' page. On the left is a yellow sticky note that says 'Click Submit to save your data.' The main form has a dropdown for 'Move Approver Two To' set to 'Before' and a 'Sequence Number' dropdown set to '1'. Below this is a table showing the current sequence:

Sequence	To	Route Role	Site	Action	Type	In Date	Out Date
1	Approver Two	(None)	COTS	Ready to send	Approval		
2	Approver One	(None)	COTS	Ready to send	Approval		

'Submit' and 'Cancel' buttons are at the bottom right.

## Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
<b>Move [user name] To</b>	<p>Select <b>Before</b> if you want to move the user to a spot before a sequence number.</p> <p>Select <b>Within</b> if you want to move the user to a spot within a sequence number.</p> <p>Select <b>After</b> if you want to move them after a sequence number.</p>
<b>Sequence Number</b>	Select the number which corresponds to the location in the sequence to which you want to move the user.

**Column Definitions**

This table lists the columns on this page, and definitions of each.

<b>Field Name</b>	<b>Description</b>
<b>Sequence</b>	Displays a numbered list of users set up in the route list. The sequence number is used to route the document from user to user.
<b>To</b>	Displays the name of the user to whom the document is to be routed in each sequence.
<b>Route Role</b>	Displays the user's route role as set up for your agency.  For example, Approver1 might display if your agency has set that label up as an approver route role. A user can be listed more than once to fill more than one role.
<b>Site</b>	Displays the site for which the route list is set up.
<b>Action</b>	Displays a message to indicate where the document is at in the routing process.  Displays Ready to be Sent if the document has not yet been routed.  Other actions that might display include Sent, Opened, Approved, Reviewed.
<b>Type</b>	Displays Approval if PRISM is set up to route documents to the user for their approval.  Displays Courtesy Copy if PRISM is set up to send the user an FYI/courtesy copy.  Displays Review if PRISM is set up to route documents to the user for their review.
<b>In Date</b>	Displays the date on which the document was routed to each user in the list.
<b>Out Date</b>	Displays the date on which the document was routed to the next user in the list.

## Examples – Move Sequences

This section includes examples of moving users before, within, and after other users in a route list. This is a screen shot of the route list used in the move sequence sample screen shots.

Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Albert Wenders	(None)	COTS	Approval
2	<input type="checkbox"/>	Molly Crockett	(None)	COTS	Approval
3	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
4	<input type="checkbox"/>	Jennifer Bacon	(None)	COTS	Approval
5	<input type="checkbox"/>	Carrie Burton	(None)	COTS	Approval
6	<input type="checkbox"/>	Gus Lee	(None)	COTS	Approval
7	<input type="checkbox"/>	Jack Smith	(None)	COTS	Approval
8	<input checked="" type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Approval

### Example Move Sequence – Before

Let's say you want to move Nicholas Modjeski from the last position (position 8) in the route list to the position before Kimberlee Lear.

The steps to do so might look something like this:

1. Select **Nicholas Modjeski** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **Before** in the *Move [user name] To* field, and **3** in the *Sequence Number* field because Kimberlee Lear is in position 3 in the route list.

PRISM

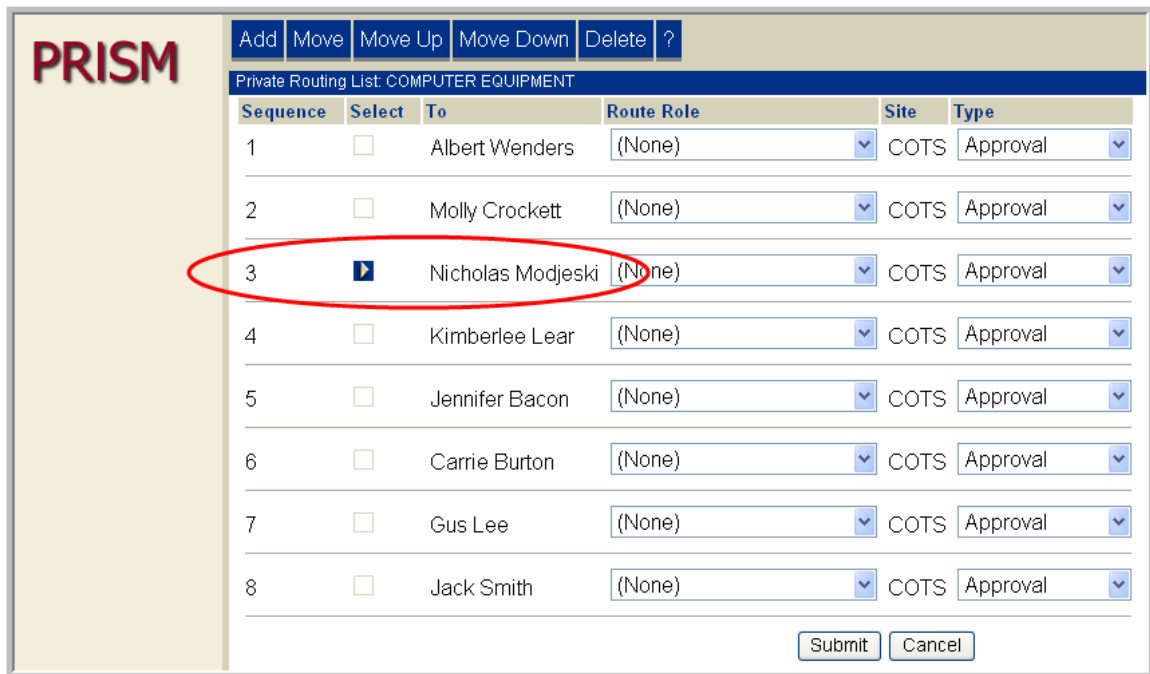
Move Sequence

Move Nicholas Modjeski To Before Sequence Number 3

Click Submit to save your data.

Submit Cancel

3. Click **Submit**. The Private Routing List page displays. Nicholas Modjeski is now in position 3 in the route list.



The screenshot shows the PRISM Private Routing List for COMPUTER EQUIPMENT. The interface includes a toolbar with buttons: Add, Move, Move Up, Move Down, Delete, and a help icon (?). Below the toolbar is a table with columns: Sequence, Select, To, Route Role, Site, and Type. The table lists eight routing entries. Entry 3, for Nicholas Modjeski, is circled in red. At the bottom of the table are Submit and Cancel buttons.

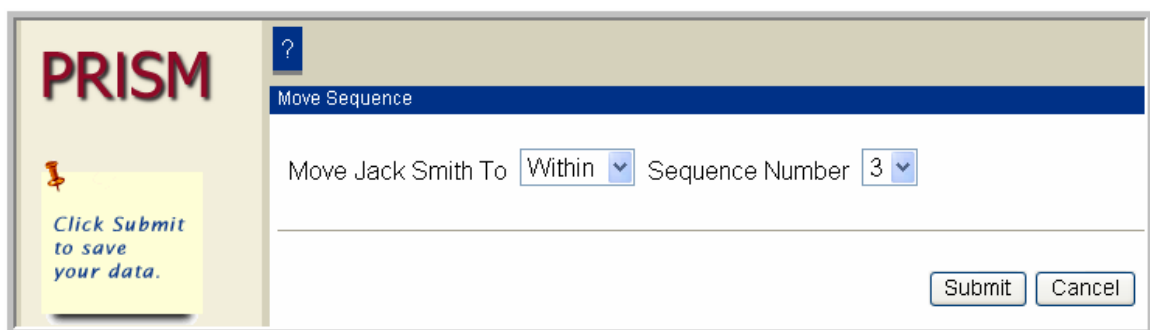
Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Albert Wenders	(None)	COTS	Approval
2	<input type="checkbox"/>	Molly Crockett	(None)	COTS	Approval
3	<input checked="" type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Approval
4	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
5	<input type="checkbox"/>	Jennifer Bacon	(None)	COTS	Approval
6	<input type="checkbox"/>	Carrie Burton	(None)	COTS	Approval
7	<input type="checkbox"/>	Gus Lee	(None)	COTS	Approval
8	<input type="checkbox"/>	Jack Smith	(None)	COTS	Approval

### Example Move Sequence – Within

Let's say you want to move Jack Smith and Molly Crockett to positions within sequence 3 so they receive documents at the same time as Nicholas Modjeski, who is now in sequence 3.

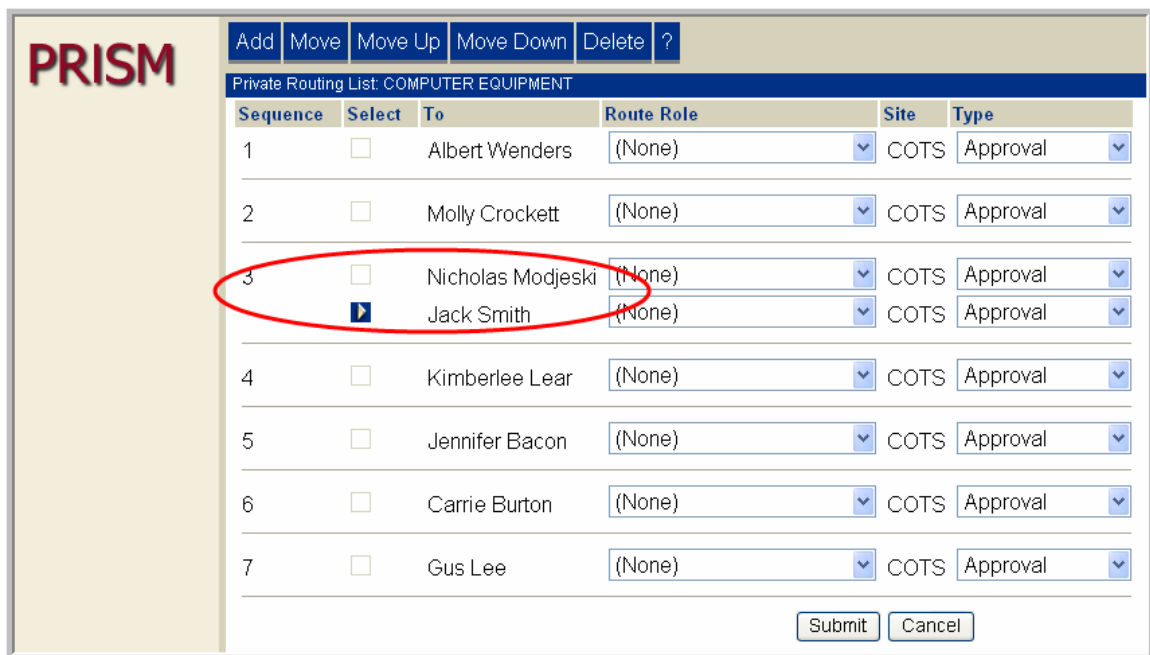
The steps to do so might look something like this:

1. Select **Jack Smith** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **Within** in the *Move [user name] To* field, and **3** in the *Sequence Number* field.



The screenshot shows the PRISM Move Sequence page. It features a toolbar with a help icon (?). The page title is "Move Sequence". Below the title, there is a form with the text "Move Jack Smith To" followed by a dropdown menu set to "Within" and a "Sequence Number" field set to "3". At the bottom right are Submit and Cancel buttons. On the left side, there is a yellow sticky note that says "Click Submit to save your data."

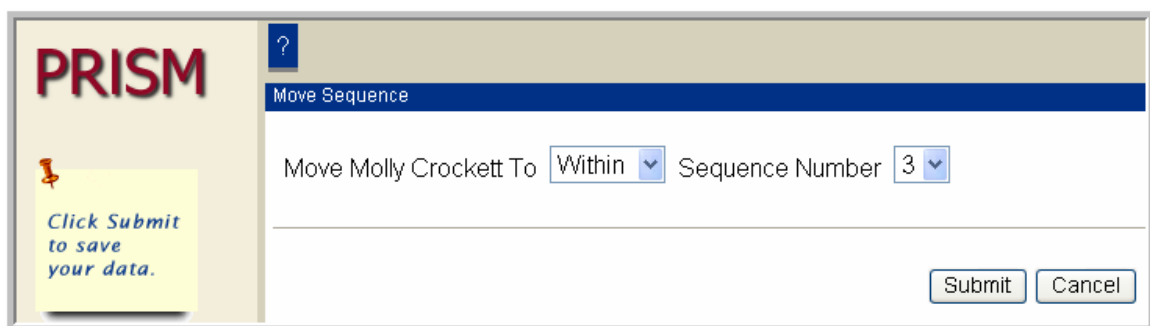
3. Click **Submit**. The Private Routing List page displays. Jack Smith now shares position 3 in the route list with Nicholas Modjeski.



The screenshot shows the PRISM Private Routing List for COMPUTER EQUIPMENT. The interface includes a blue toolbar with buttons: Add, Move, Move Up, Move Down, Delete, and a help icon (?). Below the toolbar is a table with columns: Sequence, Select, To, Route Role, Site, and Type. The table lists seven routing entries. Entry 3 is circled in red, showing Nicholas Modjeski and Jack Smith. Entry 2 shows Molly Crockett. At the bottom are Submit and Cancel buttons.

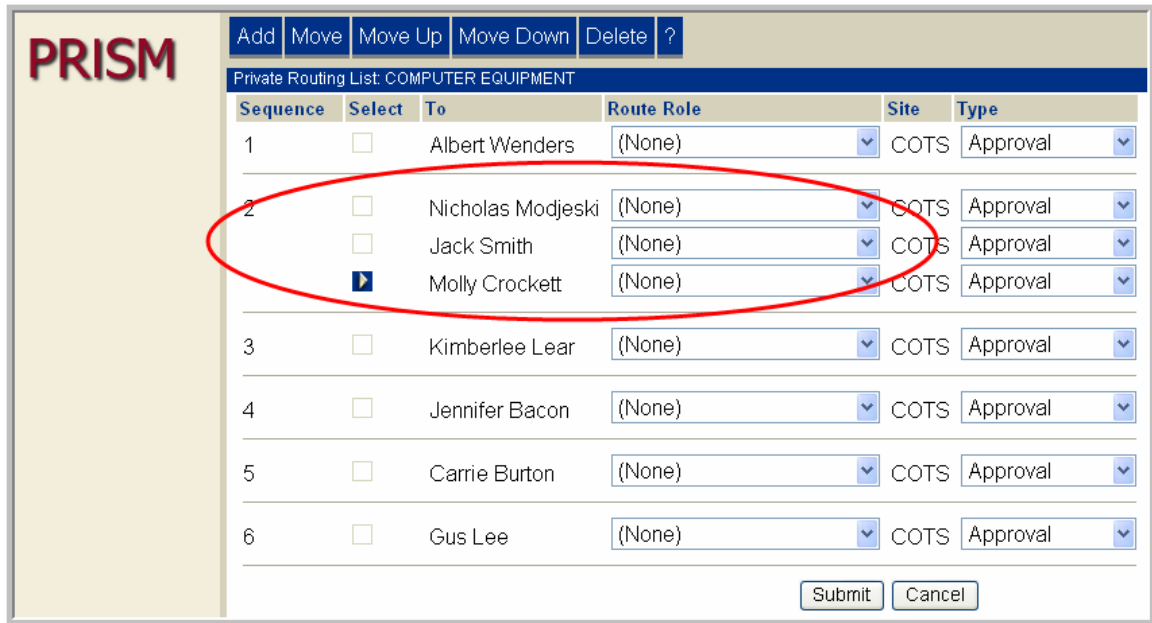
Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Albert Wenders	(None)	COTS	Approval
2	<input type="checkbox"/>	Molly Crockett	(None)	COTS	Approval
3	<input type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Approval
	<input checked="" type="checkbox"/>	Jack Smith	(None)	COTS	Approval
4	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
5	<input type="checkbox"/>	Jennifer Bacon	(None)	COTS	Approval
6	<input type="checkbox"/>	Carrie Burton	(None)	COTS	Approval
7	<input type="checkbox"/>	Gus Lee	(None)	COTS	Approval

- Now it's time to move Molly Crockett into the same sequence. Select Molly Crockett from the list and click **Move** on the blue toolbar. The Move Sequence page displays.



The screenshot shows the PRISM Move Sequence page. It features a blue toolbar with a help icon (?). Below the toolbar is a form with the text "Move Molly Crockett To" followed by a dropdown menu set to "Within" and a "Sequence Number" dropdown set to "3". At the bottom are Submit and Cancel buttons. A yellow sticky note on the left says "Click Submit to save your data."

- Click **Submit**. The Private Routing List page displays. Molly Crockett now shares position 3 in the route list with Nicholas Modjeski and Jack Smith.



The screenshot shows the PRISM Private Routing List for COMPUTER EQUIPMENT. The table lists six routing steps. A red oval highlights the second step, which is currently empty and contains three entries: Nicholas Modjeski, Jack Smith, and Molly Crockett. The first step is Albert Wenders.

Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Albert Wenders	(None)	COTS	Approval
2	<input type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Approval
	<input type="checkbox"/>	Jack Smith	(None)	COTS	Approval
	<input checked="" type="checkbox"/>	Molly Crockett	(None)	COTS	Approval
3	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
4	<input type="checkbox"/>	Jennifer Bacon	(None)	COTS	Approval
5	<input type="checkbox"/>	Carrie Burton	(None)	COTS	Approval
6	<input type="checkbox"/>	Gus Lee	(None)	COTS	Approval

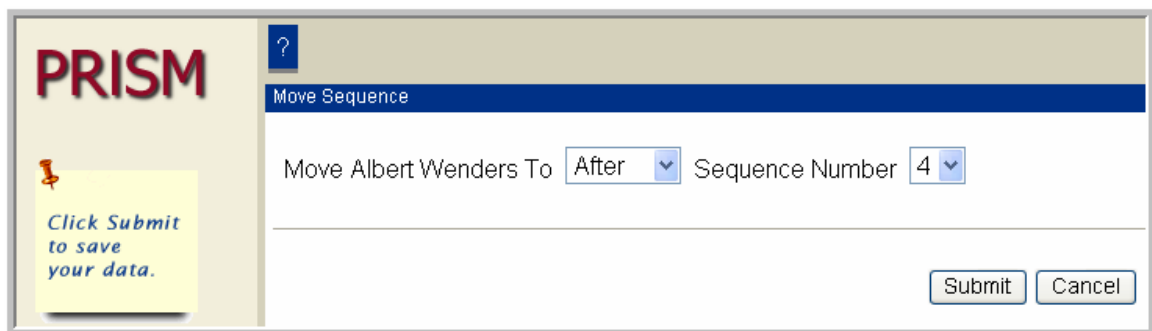
Buttons: Submit, Cancel

### Example Move Sequence – After

Let's say you want to move Albert Wenders from sequence 1 to a position in the route list after Jennifer Bacon, who is in sequence 4.

The steps to do so might look something like this:

1. Select **Albert Wenders** from the list, and click **Move** on the blue toolbar. The Move Sequence page displays.
2. Select **After** in the *Move [user name] To* field, and **4** in the *Sequence Number* field.



The screenshot shows the PRISM Move Sequence page. The 'Move Albert Wenders To' field is set to 'After' and the 'Sequence Number' field is set to '4'. A yellow sticky note on the left says 'Click Submit to save your data.'.

Buttons: Submit, Cancel

3. Click **Submit**. The Private Routing List page displays. Albert Wenders is now in position 5 in the route list.

Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Approval
	<input type="checkbox"/>	Jack Smith	(None)	COTS	Approval
	<input type="checkbox"/>	Molly Crockett	(None)	COTS	Approval
2	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
3	<input type="checkbox"/>	Jennifer Bacon	(None)	COTS	Approval
4	<input checked="" type="checkbox"/>	Albert Wenders	(None)	COTS	Approval
5	<input type="checkbox"/>	Carrie Burton	(None)	COTS	Approval
6	<input type="checkbox"/>	Gus Lee	(None)	COTS	Approval

Submit Cancel

### Examples – Setting Up Reviewers and Courtesy Copy Recipients

This section includes an example of setting up users as reviewers, courtesy copy recipients, and approvers. Let's say you want to set up a routing list for computer equipment. Some of the users from your agency need to review the documents routed to them and mark them reviewed, others need only to read it (courtesy copy), and others need to look documents over carefully to approve them.

In this hypothetical routing list, the following users must be set up in the Computer Equipment routing list.

Team	Team Members	Explanation
IT	Nicholas Modjeski Jack Smith Molly Crockett	Nicholas, Jack, and Molly are on the IT team. They answer to Kimberlee Lear, the IT Manager.
Management	Kimberlee Lear	Kimberlee is the IT Manager. She answers to Carrie Burton, the CFO.
CFO	Carrie Burton	Carrie is the CFO and decides how agency money is spent (or not!).



Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Nicholas Modjeski	(None)	COTS	Review
	<input type="checkbox"/>	Jack Smith	(None)	COTS	Review
	<input type="checkbox"/>	Molly Crockett	(None)	COTS	Courtesy Copy
2	<input type="checkbox"/>	Kimberlee Lear	(None)	COTS	Approval
3	<input checked="" type="checkbox"/>	Carrie Burton	(None)	COTS	Approval

In the screen shot above, Nicholas and Jack are set up as reviewers because they have been on the IT team for several years and have some industry certifications that make them experts in different IT-related fields. When requests come in for new computer equipment or software, their manager (Kimberlee Lear) wants them to know about it, and wants them to review requests because she trusts their technical expertise.

Molly is set up to receive a courtesy copy because she is newer on the team, has less experience, and needs to stay in the loop but does not necessarily have the expertise to dictate whether an IT purchase is wise or not.

Kimberlee is set up as an approver and must be sure that the software and equipment for which her team are responsible for setting up and maintaining is the best the industry offers. She might use comments from Nicholas and Jack to help decide whether to approve or disapprove a document.

Carrie is set up as an approver because it is her job to decide whether funds from her agency will be spent on items that are sent to her for approval.

### Private Routing List Page

The following changes have been made to this page to support the enhancements to the PRISM routing process:

- The **Delete** button on the blue toolbar was moved to the left of the online help button.
- The *Routing Order* field was removed.
- The *Sequence* column was moved to the far left and displays the sequence number only at the first node in one sequence, just as PRISM does at the document-level on the Route page.
- The *For Approval* column was removed.
- The *Type* column was added to the routing table.
- The *User Name* column was relabeled as *To*.
- The **Move** button was added to the blue toolbar.

- PRISM now hides the **Move Up** and **Move Down** buttons on the blue toolbar when there are less than two route sequences in the list.

### Before

This screen shot illustrates how this page might have looked at your agency before these changes.

**PRISM**

Click Submit to save your data.

Private Routing List: COMPUTER EQUIPMENT

Routing List Name:

Routing Order: ☒ One After Another ☐ All At Once ☐ Mixed

Select	Sequence	User Name	For Approval	Route Role
<input checked="" type="checkbox"/>	1	Albert Wenders	<input checked="" type="checkbox"/>	ACCOUNTING
<input type="checkbox"/>	2	Islas Rivers	<input checked="" type="checkbox"/>	APPROVER1
<input type="checkbox"/>	3	Jennifer A. Bacon	<input checked="" type="checkbox"/>	APPROVER2

Submit Cancel

### After

This screen shot illustrates how this page might look at your agency after these changes.

**PRISM**

Private Routing List: SITEADMINROUTE

Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	v approver 1	(None)	SITEVM	Approval
2	<input checked="" type="checkbox"/>	v reviewer 1	(None)	SITEVM	Approval

Submit Cancel

To access this page, follow these steps.

- From the PRISM Welcome page, click **System Setup** on the left menu.
- Click **Routing Lists** on the left menu. The Route Lists Maintenance page displays.
- Click **Add** on the blue toolbar. The Create Routing List page displays.

## Column Definitions

This table lists the new column on this page, and its description.

Column Name	Description
<b>Type</b>	For each user in the list, select: <ul style="list-style-type: none"><li>• <b>Review</b> if you want to set them up as a reviewer.</li><li>• <b>Approval</b> if you want to set them up as an approver.</li><li>• <b>Courtesy Copy</b> if you want to set up to receive courtesy copies.</li></ul> The default setting for this field is <b>Approval</b> .

## Button Definitions

This table lists the new button on this page, and its description.

Button Name	Description
<b>Move</b>	Displays when there are at least two users in the routing list.  To move a user to a location higher or lower than another sequence number in the list, select their name, and click <b>Move</b> on the blue toolbar. The Move Sequence page displays.

## Preferences

This section describes the enhancements made to the Preferences module to support this new functionality.

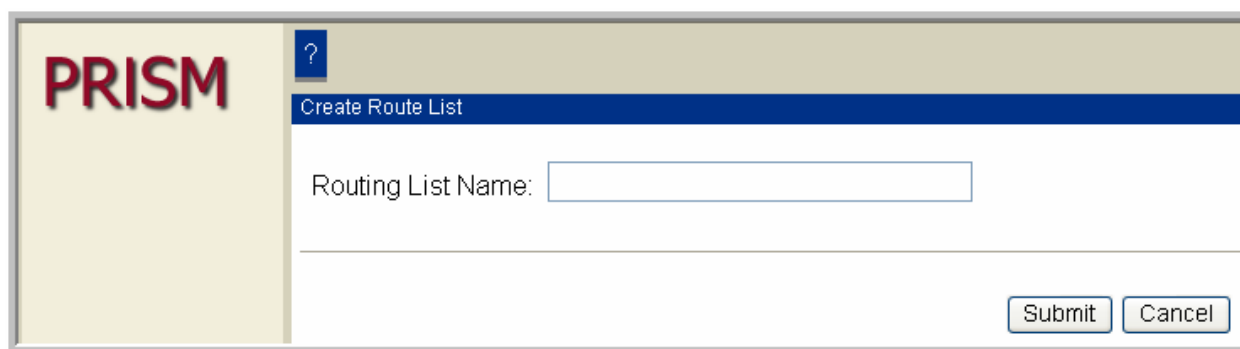
### Create Route List Page

The *Routing Order* field was removed from this page to support the enhancements to the PRISM routing process:

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Preferences** on the left menu. The General Preferences Summary page displays.
2. Click **Routing Lists** on the left menu. The Routing Lists page displays.
3. Click **Add** on the blue toolbar. The Create Route List page displays.

This is how this page might now look at your agency.



## ***Routing List Page***

The following changes were made to this page to support the enhancements to the PRISM routing process:

- The read-only *Routing Order* field was removed and replaced by the **Move** button on the Private Routing List page. The functionality from the *Routing Order* field which enabled you to move a user to a specific location in a route list was incorporated into the Move Sequence page (see [Move Sequence Page](#)).
- The **Add Approver** and **Add Reviewer** buttons were removed. They were replaced by the **Add** button, in which their functionality was combined.
- The *Type* column was moved to the end of the columns.
- The *Type* column was changed to read-write so you can specify the route type for the route nodes you set up. Also, it includes a dropdown list from which you can select **Approval**, **Review**, or **Courtesy Copy**.
- The **Move Up** and **Move Down** buttons do not display if there are less than two users on the route.
- The **Move** button was added to this page so you can move a reviewer or approver to a specific location on the route.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Preferences** on the left menu. The General Preferences Summary page displays.
2. Click **Routing Lists** on the left menu. The Routing Lists page displays.
3. Select a routing list and click **Edit**. The Routing List page displays.

This is how this page might now look at your agency.

Sequence	Select	To	Route Role	Site	Type
1	<input type="checkbox"/>	Approver One	(None)	COTS	Approval
2	<input checked="" type="checkbox"/>	Approver Two	(None)	COTS	Approval

### Button Definitions

This table lists the new button on this page, and its description.

Button Name	Description
<b>Add</b>	Click to access the Add User to Route List page, on which you can select from a list of PRISM users. These are the people on the route to whom the document is routed for review and/or approval during the procurement process.
<b>Move</b>	Displays when there are at least two users on the routing list. To move a user to a location higher or lower than another sequence number in the list, select their name, and click <b>Move</b> on the blue toolbar. The Move Sequence page displays.

### Inbox

This section describes the enhancements made to the PRISM Inbox to support this new functionality.

### Courtesy Copy Documents Page

The Courtesy Copy Documents page was added to PRISM to support the enhancements to the PRISM routing process. Use it to see a list of the documents routed to you as a courtesy, but no action is required.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Inbox** on the left menu, or click the hyperlink next to the message, "You have [#] unread messages in your Inbox." The Documents for Approval page displays.
2. Click **Courtesy Copy** on the left menu. The Courtesy Copy Documents page displays. (See screen shot, next page.)



## Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
<b>Select</b>	Click to select a document in the list.
<b>From</b>	Displays the name of the document's originator.
<b>Document Number</b>	Displays the document's number.
<b>Document Type</b>	Displays the type of document. For example, displays Requisition if you were routed a courtesy copy of a requisition, or Solicitation if you were routed a courtesy copy of a solicitation, etc.
<b>Received</b>	Displays the date on which PRISM routed the courtesy copy to your Inbox.

## Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
<b>Log Off</b>	Click to log off PRISM.

## Route Page

The following changes have been made to this page to support the enhancements to the PRISM routing process:

- The **Add Approver** and **Add Reviewer** buttons were removed. They were replaced by the **Add** button, in which their functionality was combined.
- The *Type* column was changed to read-write so you can specify the route type for the route nodes you set up. Also, it includes a dropdown list from which you can select **Approval**, **Review**, or **Courtesy Copy**.
- The **Move Up** and **Move Down** buttons do not display if there are less than two users on the route.
- The **Move** button was added to this page so you can move a reviewer or approver to a specific location on the route.

To access this page, follow these steps.

1. Access the document you want to route.
2. On the General Information page, click **Route** on the blue toolbar. The Review Route Selection page displays.
3. Select **Template**, **Private Template**, or **New Route**, according to your agency's business practices or your routing needs.
4. Click **Submit**. The Route page displays.

This is how this page might look at your agency.

## Button Definitions

This table lists the new buttons on this page, and their descriptions.

Button Name	Description
<b>Add</b>	Click to access the Add User to Route List page, on which you can select from a list of PRISM users. These are the people on the route to whom the document is routed for review and/or approval during the procurement process.

Button Name	Description
<b>Move</b>	Displays when there are at least two users on the routing list.  To move a user to a location higher or lower than another sequence number in the list, select their name, and click <b>Move</b> on the blue toolbar. The Move Sequence page displays.

## Route History

The following changes have been made to this page to support the enhancements to the PRISM routing process:

- PRISM logs the courtesy copy records as well as the review and approval records and displays that information on this page.
- The *Status* column displays Reviewed as Courtesy Copy for users in the list who were sent courtesy copies, after they review their courtesy copy of the document.
- The *Status* column displays Reviewed for users in the list who are reviewers, after they review the document.

To access this page, follow these steps.

1. From the PRISM Welcome page, access a routed document.
2. Click **Route History** on the left menu. The Route History page displays.

**PRISM**

Route Release ?

**Requisition**

Main  
Items  
Vendors  
Package  
Supporting Docs  
Currency  
Validations  
**Route History**  
Status History  
Notifications  
Ownership  
Navigator  
Return to Inbox

**Requisition Information**

Requisition Number: 172REQ10 Status: In Progress Number of Items: 1  
Version: BASE Stage: Requisition Total Amount: \$600,000.00  
Net View: Off Commitment: \$600,000.00

**Route History**

Route Role	To	In Date	Out Date	Comments	Status	Version	Phone	Site	Routing Symbol
(None)	Nicholas Modjeski	12/27/2005 04:52 PM	12/27/2005 04:53 PM	Y	Reviewed	BASE	111-111-1111	COTS	
(None)	Molly Crockett	12/27/2005 04:52 PM	12/27/2005 04:53 PM	Y	Reviewed as Courtesy Copy	BASE	111-111-1111	COTS	
(None)	Kimberlee Lear	12/27/2005 04:51 PM	12/27/2005 04:52 PM	Y	Reviewed	BASE	111-111-1111	COTS	
(None)	Albert Wenders	12/27/2005 04:51 PM	12/27/2005 04:51 PM	Y	Reviewed as Courtesy Copy	BASE	111-111-1111	COTS	
(None)	Jennifer Bacon		12/27/2005 04:51 PM	N	Originator	BASE	111-111-1111	COTS	



# User-Defined Time Limits

PRISM has been enhanced to include time-limits for documents awaiting approval and/or review in your Inbox. Your agency can set up notification rules for the following document types in PRISM:

- Requisitions
- Solicitations
- BPA Setups
- BPA Calls
- Contracts
- Delivery Order/Task Orders
- IAA's
- MIPR's
- Purchase Orders
- APP's
- Invoices
- Acceptance Reports (if the acceptance type is DD 250 at the agency level)
- Grants
- Purchase Card Orders
- Section 845 OT's
- Section 845 OT Delivery Order/Task Orders



*Note*

The MAS document type shares the route notification rules with the contract document type.

## About Notifications

With this new functionality, you can now set up what are called “first notifications” and “recurring notifications” at the site level for each document type. When you set up your notifications, you can define the same set of user roles for first notifications as recurring notifications, based on the document type.

You can also set PRISM up to bypass a route role (whether they are an approver or a reviewer) after a certain number of days have passed. Lastly, PRISM notifies you if a document you were supposed to review or approve is bypassed.

## **About First Notifications**

First notifications are one-time notifications sent to a user when a document is awaiting action for their particular route role. PRISM can be set up to send first notifications when the number of days a document has awaited action for a particular route role exceeds the number of days you specify.

## **About Recurring Notifications**

Recurring notifications are multiple notifications sent to a user when a document has been awaiting action for their particular route role. PRISM can be set up to send recurring notifications after the first notifications have been sent, when the number of days a document is awaiting action since the last notification for a particular route role exceeds the number of days you specify.

Recurring notifications can be triggered upon approval and/or disapproval and/or review. They are sent repeatedly until the document leaves the current route role.

## **System Setup for User-Defined Time Limits**

This section includes the setup necessary to use this new functionality.

### **User General Page**

The *Manager* and *Stalled Route Notifications via* fields were added to this page to support the enhancements to the PRISM routing process:

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **User** on the left menu. The User Selection page displays.
3. Select a user from the list and click **Open** on the blue toolbar. The General Summary page displays.
4. Click **Edit**. The User General page displays.

**PRISM**

*Click Submit to save your data.*

**User General :**

User ID: \_\_\_\_\_

First Name: \_\_\_\_\_

Initial: \_\_\_\_\_

Last Name: \_\_\_\_\_

Formal Name:

(first last) \_\_\_\_\_

(last,first) \_\_\_\_\_

Site ID: \_\_\_\_\_

Routing Symbol: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email Address: \_\_\_\_\_

Notify via: PRISM Inbox ▼

Last Login: \_\_\_\_\_

Password Expiration Date: \_\_\_\_\_

Date of Last Training: \_\_\_\_\_

COR Certified?: ☐

Government Employee?: (None) ▼

Mail Stop: \_\_\_\_\_

Manager: \_\_\_\_\_

Stalled Route Notifications via: PRISM Inbox ▼

Submit Cancel

## Field Definitions

This table lists the new fields on this page, and definitions of each.

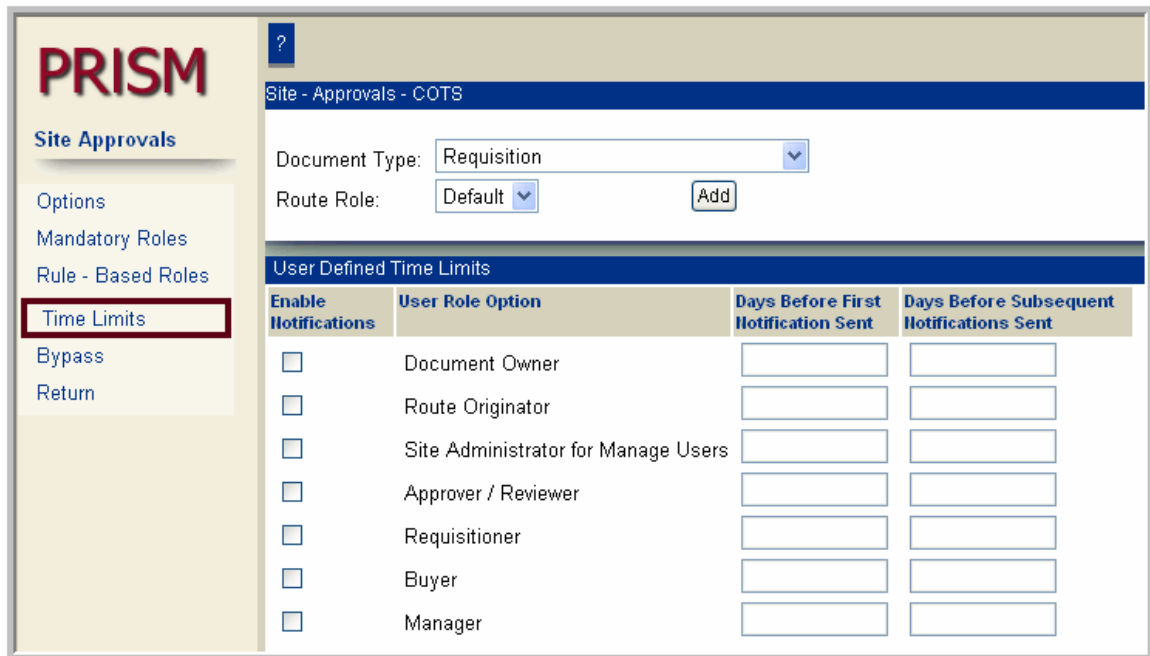
Field Name	Description
<b>Manager</b>	If you want to set up the manager for this user, type or select their name in this field.
<b>Stalled Route Notifications via</b>	Select <b>Email</b> , <b>PRISM Inbox</b> , or <b>Both</b> , according to how you want PRISM to send the stalled route notifications to the user's manager.

## Site – User Defined Time Limits Page

The User Defined Time Limits page is new in PRISM to support the user-defined time limits new functionality. Use this page to activate the notifications feature, and to set up the number of days before PRISM sends first and/or subsequent notifications for document owners, route originators, site administrators for manage users, approvers/reviewers, buyers, and managers.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Select a site from the list and click **Open**. The General Summary page displays.
4. Click **Approvals** on the left menu. The Approvals Summary page displays.
5. Click **Edit** on the blue toolbar. The Options page displays.
6. Click **Time Limits** on the left menu. The User Defined Time Limits page displays.



**PRISM**

Site Approvals

Options  
Mandatory Roles  
Rule - Based Roles  
**Time Limits**  
Bypass  
Return

Site - Approvals - COTS

Document Type: Requisition  
Route Role: Default Add

User Defined Time Limits			
Enable Notifications	User Role Option	Days Before First Notification Sent	Days Before Subsequent Notifications Sent
<input type="checkbox"/>	Document Owner		
<input type="checkbox"/>	Route Originator		
<input type="checkbox"/>	Site Administrator for Manage Users		
<input type="checkbox"/>	Approver / Reviewer		
<input type="checkbox"/>	Requisitioner		
<input type="checkbox"/>	Buyer		
<input type="checkbox"/>	Manager		



### Note

If you select the *Site Administrator for Manage Users* field on the User Defined Time Limits page, you must have given your site administrator the ability to manage sites so they can configure route notifications at the site level. To do so, check the box in the *Manage Sites* field on the Edit Site Admin for [site code] page. (System Setup | Sys Configuration | Open | Admins | select an administrator and Edit.)

## Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
Document Type	Select the document type for which you want to set up notifications.
Route Role	Select the route role for which you want to set up notifications.

## Column Definitions

This table lists the columns on this page, and definitions of each.

Column Name	Description
Enable Notifications	Check the box to enable the notifications feature.
User Role Option	Displays a list of user roles for which you can enable the notifications features.
Days Before First Notification Sent	Type the number of days before the first notification message is to be sent to each user role in the list.
Days Before Subsequent Notifications Sent	Type the number of days before the subsequent notification message is to be sent to each user role in the list.

## Button Definitions

This table lists the buttons on this page, and definitions of each.

Button Name	Description
Add	Click to access the Route Role Selection page, on which you can add a new route role to the drop-down list in the Route Role field.

## Site – Route Role Bypass Options Page

The Route Role Bypass Options page is new in PRISM to support the user-defined time limits new functionality. Use this page to set up the number of days that elapse before a route role is bypassed for different document types.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu.
2. Click **Sys Configuration** on the left menu. The Site Selection page displays.
3. Select a site from the list and click **Open**. The General Summary page displays.
4. Click **Approvals** on the left menu. The Approvals Summary page displays.

5. Click **Edit** on the blue toolbar. The Options page displays.
6. Click **Bypass** on the left menu. The Route Role Bypass Options page displays.

The screenshot shows the PRISM application interface. On the left is a sidebar with the PRISM logo and a menu under 'Site Approvals' including 'Options', 'Mandatory Roles', 'Rule - Based Roles', 'Time Limits', 'Bypass' (which is highlighted with a red box), and 'Return'. The main content area is titled 'Route Role Bypass Options'. At the top of this area are buttons for 'Add', 'Delete', and '?'. Below these is a 'Document Type' dropdown menu currently set to 'Requisition'. Another section header 'Route Role Bypass Options' is followed by a table with three columns: 'Select', 'Route Role', and 'Days Before Role is Bypassed'. The 'Select' column contains a checkbox, the 'Route Role' column contains the text 'OSD Study Coordinator', and the 'Days Before Role is Bypassed' column contains an empty text input field.

### Field Definitions

This table lists the fields on this page, and definitions of each.

Field Name	Description
<b>Document Type</b>	Select the document type for which you want to set up a route role bypass.

### Column Definitions

This table lists the columns on this page, and definitions of each.

Column Name	Description
<b>Select</b>	Check the box to select a route role in the list.
<b>Route Role</b>	Displays the name of the route role.
<b>Days Before Role is Bypassed</b>	Type the number of days you want to elapse before PRISM skips this route role in the routing process.

### Button Definitions

This table lists the buttons on this page, and definitions of each.

Button Name	Description
<b>Add</b>	Click to access the Route Role Selection page on which you can select a route role from the list.

Button Name	Description
Delete	Select a route role from the list and click to delete the role from the list.

## Inbox

This section describes the enhancements to the PRISM Inbox.

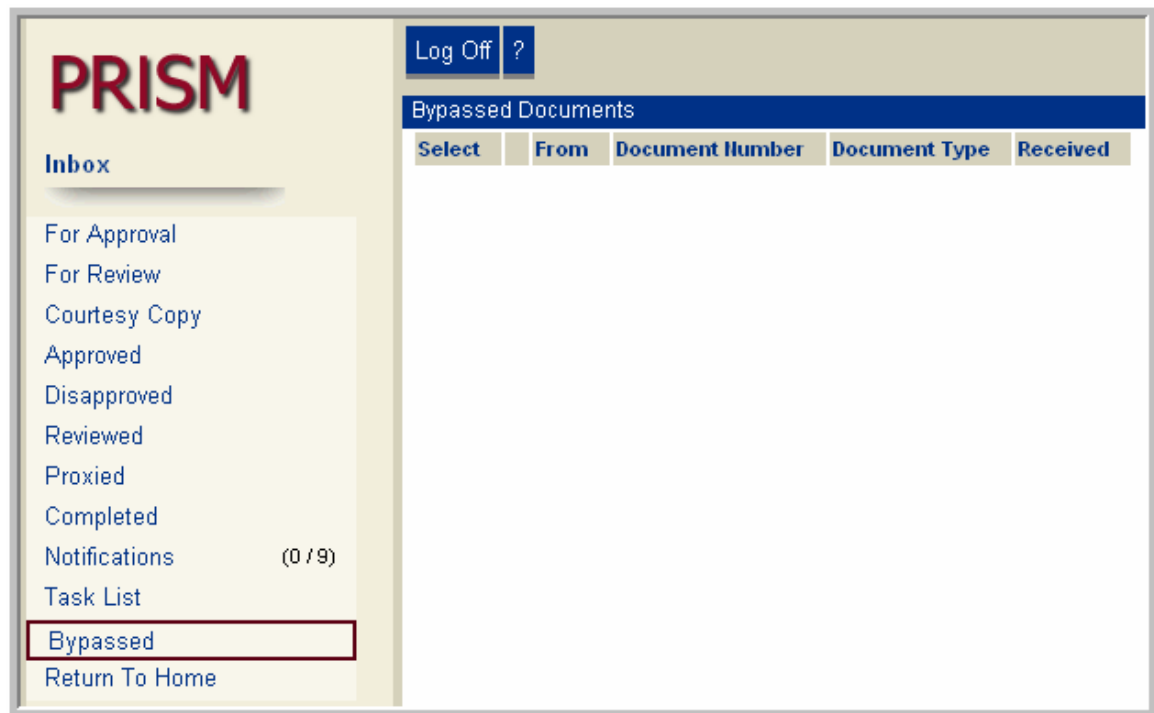
### Bypassed Document Page

The Bypassed Document page is new in PRISM. It contains bypass notices for the documents that you were supposed to approve or review. If PRISM bypasses you, the bypassed document is removed from your For Approval folder, or For Review folder, and a bypass notice is sent to your Bypassed folder. Bypassed documents are then sent to the next PRISM approver or reviewer on the route list.

If you are set up to receive recurring notifications, when a notifications are triggered, a new record is sent to your Inbox (or email, according to your user profile setup).

To access this page, follow these steps.

1. From the PRISM Welcome page, click **Inbox** on the left menu or click **Inbox** on the left menu or click **Inbox** on the left menu, or you can click the hyperlink next to the message, "You have [#] unread messages in your Inbox." The Documents for Approval page displays.
2. Click **Bypassed** on the left menu. The Bypassed Document page displays.



## Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
<b>Select</b>	Click to select a document in the list.
<b>From</b>	Displays the name of the document's originator.
<b>Document Number</b>	Displays the document's number.
<b>Document Type</b>	Displays the type of document. For example, displays <i>Requisition</i> if the bypass notification was for a requisition, or <i>Solicitation</i> if the bypass notification was for a solicitation, etc.
<b>Received</b>	Displays the date on which PRISM routed the courtesy copy to your Inbox.

## Button Definitions

This table lists the button on this page, and its description.

Button Name	Description
<b>Log Off</b>	Click to log off of PRISM.

## Bypass Example

The following is an example scenario to illustrate how the bypass feature might work at your agency.



A routing list is set up with the following users, in this order:

1. Julien (Approver)
2. Lydia (Approver)
3. Ciara (Reviewer)
4. Daphne (Approver)

The requisitioner in this scenario is named Olivier.

The routing list is set up with a five day time limits on reviewers. If a document sits in a reviewer's queue more than five days, PRISM will route it to the next person in the list and send a bypass notification to the owner of the route role that was bypassed.



So let's say it's summer vacation time and Ciara decides to take a three week trip to Montréal (lucky Ciara!). On the third day of her absence from work, Olivier decides he needs to buy some IT equipment so he creates a requisition and routes it for approval to the routing list above.

PRISM routes the document to Julien who immediately approves it. PRISM then routes it to Lydia, who also immediately approves it. Ciara is absent, so the requisition sits in her queue for five days. At the end of the fifth day, PRISM automatically routes the requisition to Daphne, and sends a bypass notification to Ciara, who will read the notification when she gets back from Montréal.

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# Security Groups

Compusearch is proud to announce enhancements to PRISM Security Groups! This section describes changes made to PRISM to support the enhancements to the Security Groups module in System Setup.



**Important!**

Do not worry! This enhancement does not change your current settings. Your agency's setup in the Security Groups module that was in place before this enhancement was introduced will be in place after it is introduced.



## Security Groups Menu Changes

The Menu Access and Control Privileges menu items have been removed from the Security Groups menu, and their functionality combined and updated in the new Privileges page.

To access this menu, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Click **Add**, or select a security group from the list and click **Edit**. The Edit Security Groups page displays, and the Security Groups menu displays on the left menu.

This table illustrates how the Security Groups menu looked before and after this enhancement.

Before This Enhancement	After This Enhancement
	

## Edit Security Group Page

This page was modified to support the enhancements to the Security Groups module in System Setup. Before the change, you had use the **On**, **Off**, and **Not Assigned** radio buttons to activate or deactivate privileges for a security group. After the change, you click **Privileges** on the blue toolbar, and use the Privileges page to search for and set up each security group's privileges.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select a security group from the list and click **Edit**. The Edit Security Groups page displays.

### Before

This is how this page might have looked at your agency for the Menu Access menu, before this enhancement to the Security Groups module.

Object Description	Privilege
File: New	<input checked="" type="radio"/> On <input type="radio"/> Off <input type="radio"/> Not Assigned
File: Open	<input checked="" type="radio"/> On <input type="radio"/> Off <input type="radio"/> Not Assigned
Administration	<input type="radio"/> On <input type="radio"/> Off <input checked="" type="radio"/> Not Assigned
System Setup	<input type="radio"/> On <input checked="" type="radio"/> Off <input type="radio"/> Not Assigned
System Setup: Site: General	<input type="radio"/> On <input type="radio"/> Off <input checked="" type="radio"/> Not Assigned
System Setup: Site: Approvals	<input type="radio"/> On <input type="radio"/> Off <input checked="" type="radio"/> Not Assigned

This is how this page might have looked at your agency for the Control Privileges menu, before this enhancement to the Security Groups module.

Object Description	Privilege
(APP) Tab: Addl Info	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Supporting Docs	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Attachments	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Schedule/Contacts	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Estimated Costs	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Solic/Award	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned
(APP) Tab: Notes	<input type="radio"/> Full Access <input type="radio"/> Read Only <input type="radio"/> Disable <input checked="" type="radio"/> Not Assigned

**After**

This is how this page might have looked at your agency after this enhancement to the Security Groups module.

The screenshot shows the PRISM Security Groups interface. On the left, there's a sidebar with the PRISM logo and 'Security Groups' section, with a 'General' tab selected. The main content area is titled 'Edit Security Group: BUYERS'. It features a 'Name' field containing 'BUYERS'. Below this, there are two columns: 'Userid - Username' and 'Non Members'. Between these columns are buttons for '<< Add <<' and '>> Remove >>'. The 'Non Members' list includes: A123, APPROVER1, APPROVER2, ASTAPPR, ASTBUYER, ASTCO, ASTREQ, and ASTDEW.

**Privileges Page**

The Privileges page was added to PRISM to support the enhancements to the Security Groups module. Use it to search for and view the privileges set up for your agency's Public and non-public security groups.



*Wait a  
Minute!*

Before you read any further, it's important that you understand that there is no concept of cancel in this enhanced version of Security Groups. Normally if you click **Cancel** in PRISM, the changes you make are not saved. If you click **Return** on the Privileges page, changes you made are saved. You must click **Reset** if you want to revert back to the settings that were in place before you made changes.

To access this page, follow these steps.

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select a security group from the list and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays. (See screen shot, next page.)

## Field Definitions

This table lists the fields on this page, and descriptions of each.

Field Name	Description
<b>Module</b>	<p>Select the module for which you want to view or set up group security, select the name of the function in the <i>Name</i> field, and click <b>Search</b> if you want to set up group security for a specific function in a specific module.</p> <p>Or, you can select <b>All Modules</b> from the list and select the name of the function in the <i>Name</i> field, and click <b>Search</b> if you want to view or set up group security for a specific function across all modules.</p>
<b>Name</b>	Select the name of the function for which you want to view or set up group security.
<b>Category</b>	<p>Select <b>All</b> if you want to search by both action (Function), and by the type of data to which the user has access (Data Access).</p> <p>Select <b>Function</b> if you want to search by actions (things from the blue toolbar, such as FPDS, Cancel, Suspend, etc.).</p> <p>Select <b>Data Access</b> if you want to search by the type of data to which the user has access (things from the left menu such as Attachments, or Limits, etc.).</p>

Field Name	Description
<b>Value</b>	<p>You can search by value for both the Public security group, and non-public security groups. The selections that display in the drop-down list differ depending on whether you are searching the Public security group or non-public security groups. For example, the Public security group uses <b>Hidden</b> as a value, and non-public security groups use <b>Not Assigned</b> as a value.</p> <p>If you are updating or setting up security for non-public security groups:</p> <ul style="list-style-type: none"> <li>• Select <b>All</b> if you want to view all the values set up for a security group, whether they are on, or not assigned.</li> <li>• Select <b>On</b> if you want to view only those items which are activated for a security group.</li> <li>• Select <b>Not Assigned</b> if you want to view only those items which are not assigned for a security group.</li> </ul> <p>If you are updating or setting up security for the Public security group:</p> <ul style="list-style-type: none"> <li>• Select <b>All</b> if you want to view all the items set up for the Public security group, whether it is activated, editable, read-only, deactivated, or hidden.</li> <li>• Select <b>On / Full Access / Read Only</b> if you want to view only those items set up for the Public security group which are activated, editable, or read-only.</li> <li>• Select <b>Off / Hidden</b> if you want to view only those items set up for the Public security group which are deactivated, or hidden from the user's view.</li> </ul>
<b>Sort By</b>	<p>Select <b>Module</b> if you want to view the list in alphabetical order by the items in the <i>Module</i> column.</p> <p>Select <b>Name</b> if you want to view the list in alphabetical order by the items in the <i>Name</i> column.</p> <p>Select <b>Category</b> if you want to view the list in alphabetical order by the items the <i>Category</i> column.</p> <p>Select <b>Value</b> if you want to view the list in alphabetical order by the items in the <i>Value</i> column.</p>
<b>Sort Direction</b>	<p>Select <b>Ascending</b> if you want to view the list in alphabetical order starting with the letter A and ending with the letter Z.</p> <p>Select <b>Descending</b> if you want to view the list in reverse alphabetical order, starting with the letter Z and ending with the letter A.</p>

## Column Definitions

This table lists the columns on this page, and descriptions of each.

Column Name	Description
<b>Module</b>	Displays the PRISM module for each function or data access feature in the list.
<b>Name</b>	Displays the name of each function or data access feature in the list.
<b>Value</b>	<p>Displays a checkbox functions and drop-down list for data access.</p> <p>If you are setting up security for a function, check the box to activate it.</p> <p>If you are setting up security for a data access feature:</p> <ul style="list-style-type: none"><li>• Select <b>Full Access</b> if you want all users in the security group to have full access to that feature.</li><li>• Select <b>Read Only</b> if you want all users in that security group to be able to view that feature but you do not want them to be able to make changes.</li><li>• Select <b>Hidden</b> if you do not want that feature to display in PRISM for any of the users in the security group.</li></ul>
<b>Public</b>	Displays On, or Off, depending on the item's status in the Public security group. Settings in the Public security group supersede any settings in subsequent security groups.

## Button Definitions

This table lists the buttons on this page, and descriptions of each.

Button Name	Description
<b>Search</b>	Select the criteria for your query and click <b>Search</b> . PRISM returns a list of the items that meet your criteria.
<b>Return</b>	Click to go back to the Edit Security Group page. PRISM automatically saves your security group settings, so nothing is lost when you click <b>Return</b> .
<b>Hide</b>	Click if you do not want to view the left panel on the page. When you click <b>Hide</b> , the <b>Show Search Criteria</b> button displays.
<b>Show Search Criteria</b>	Click if you want to view the left panel on the page. Displays only if you click <b>Hide</b> .
<b>Save</b>	Click to save your security group settings.



Button Name	Description
<b>Reset</b>	Click to revert back to the settings in place before you made changes.

## Examples

This section contains some examples of how you might use the new Privileges page to set up system access rights for a security group.

### Setting Up Ability to Create Requisitions

Let's say you just created a security group called Requisitioners, and you want to set them up with access rights to create requisitions.

The steps to do so might look something like this:

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select the **Requisitioners** security group from the list, and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays.
5. In the *Module* field, select **Regular Requisition**.
6. In the *Name* field, select **Create**.
7. Click **Search**. PRISM searches for your criteria and displays the information related to your search.
8. Check the box in the *Value* column to set up all users in the Requisitions security group with the ability to create regular requisitions.

Search Return Hide ?

**Module**  
Regular Requisition

**Name**  
Create

**Category**  
All

**Value**  
All

**Sort By**  
Name

**Sort Direction**  
Ascending

Search Return Hide ?

Privileges: REQUISITIONERS

Save Reset

**Function**

Module	Name	Value	Public
Regular Requisition	Create	<input checked="" type="checkbox"/>	Off

**Data Access**

Module	Name	Value	Public
--------	------	-------	--------

Save Reset

9. Click **Save**. PRISM saves the setting in the *Value* column.
10. Click **Return** to go back to the previous page.

### **Determining Security Set Up for Contracts**

Let's say your agency has a security group called Buyers, and you want to find out what security has already been set up for contracts for that security group.

The steps to do so might look something like this:

1. From the PRISM Welcome page, click **System Setup** on the left menu. The System Setup menu displays.
2. Click **Security** on the left menu. The Security Groups page displays.
3. Select the **Buyers** security group from the list, and click **Edit**. The Edit Security Groups page displays.
4. Click **Privileges** on the blue toolbar. The Privileges page displays.
5. In the *Module* field, select **Contract**.
6. Leave the *Name* field blank.
7. Click **Search**. PRISM searches for your criteria and displays the information related to your search. (See screen shot, next page.)

Search Return Hide ?

Module  
Contract

Name

Category  
All

Value  
All

Sort By  
Name

Sort Direction  
Ascending

Search Return Hide ?

Privileges: BUYERS

Save Reset

Function

Module	Name	Value	Public
Contract	Cancel	<input type="checkbox"/>	Off
Contract	Change Text	<input type="checkbox"/>	Off
Contract	Clear PIID	<input type="checkbox"/>	Off
Contract	Closeout	<input type="checkbox"/>	Off
Contract	Closeout Reopen	<input type="checkbox"/>	Off
Contract	Configure	<input type="checkbox"/>	Off
Contract	Create	<input type="checkbox"/>	Off
Contract	Delete	<input type="checkbox"/>	Off
Contract	Delete Clause	<input type="checkbox"/>	Off
Contract	Delete Payment	<input type="checkbox"/>	Off
Contract	Delete Template	<input type="checkbox"/>	Off
Contract	FPDS	<input type="checkbox"/>	Off
Contract	Hold	<input type="checkbox"/>	Off
Contract	Mark As Complete	<input type="checkbox"/>	Off
Contract	Modify	<input type="checkbox"/>	Off
Contract	Notifications	<input type="checkbox"/>	Off
Contract	Open	<input type="checkbox"/>	Off
Contract	Release	<input type="checkbox"/>	Off
Contract	Remove Hold	<input type="checkbox"/>	Off
Contract	Reopen	<input type="checkbox"/>	Off
Contract	Reset	<input type="checkbox"/>	Off
Contract	Review FPDS Record	<input type="checkbox"/>	Off
Contract	Route History	<input type="checkbox"/>	Off
Contract	Save As Template	<input type="checkbox"/>	Off
Contract	Status History	<input type="checkbox"/>	Off
Contract	Summary Report	<input type="checkbox"/>	Off
Contract	Synopsis	<input type="checkbox"/>	Off
Contract	Validations	<input type="checkbox"/>	Off
Contract	View Form	<input type="checkbox"/>	Off

Data Access

Module	Name	Value	Public
Contract	Acceptance	Not Assigned	Hidden
Contract	Additional Info	Not Assigned	Hidden
Contract	Attachments	Not Assigned	Hidden
Contract	Claims	Not Assigned	Hidden
Contract	Cover Page	Not Assigned	Hidden
Contract	Currency	Not Assigned	Hidden
Contract	Discount	Not Assigned	Hidden
Contract	First Article Testing	Not Assigned	Hidden
Contract	Items	Not Assigned	Hidden
Contract	Items UCA	Not Assigned	Hidden
Contract	Limits	Not Assigned	Hidden
Contract	Ownership	Not Assigned	Hidden
Contract	Package Body	Not Assigned	Hidden
Contract	Payments	Not Assigned	Hidden
Contract	Protests	Not Assigned	Hidden
Contract	Reconstruct	Not Assigned	Hidden
Contract	Recurring Obligations Admin	Not Assigned	Hidden
Contract	Recurring Obligations Obligations	Not Assigned	Hidden
Contract	Recurring Obligations Payment Schedule	Not Assigned	Hidden
Contract	Recurring Obligations Setup	Not Assigned	Hidden
Contract	Supporting Docs	Not Assigned	Hidden
Contract	Suspense Items	Not Assigned	Hidden
Contract	Text	Not Assigned	Hidden
Contract	UCA	Not Assigned	Hidden
Contract	Vendor General	Not Assigned	Hidden
Contract	Vendor Performance	Not Assigned	Hidden

Save Reset